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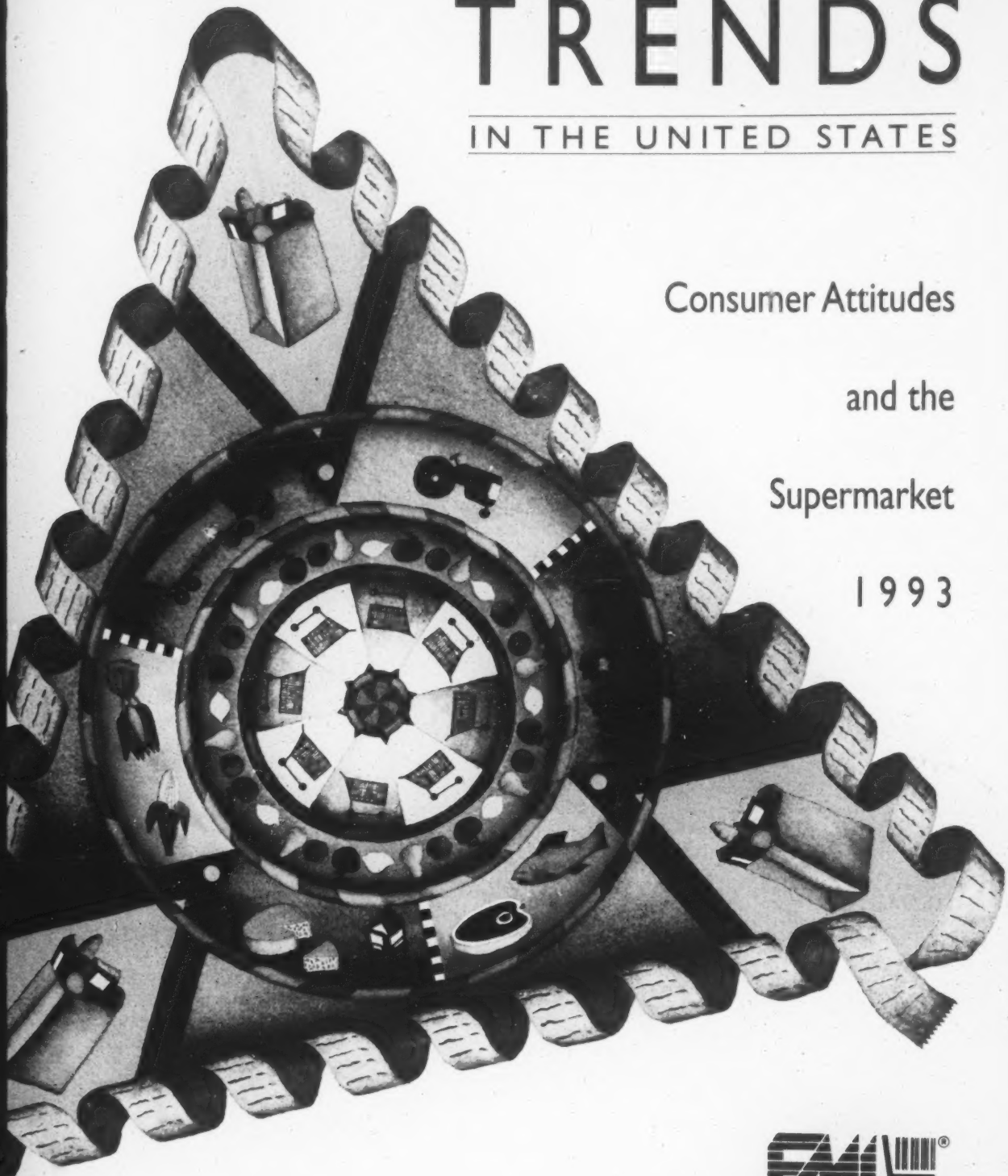
TRENDS

IN THE UNITED STATES



Consumer Attitudes and the Supermarket 1993

FMI
FOOD MARKETING INSTITUTE

TRENDS 93

CONSUMER ATTITUDES & THE SUPERMARKET 1993

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INTRODUCTION

This study is the twenty-second in a series of consumer attitude surveys begun in 1973 by the Food Marketing Institute. Designed to identify the changing needs and priorities of the American consumer, *Trends in the United States—Consumer Attitudes and the Supermarket, 1993* tracks core issues from previous years, while exploring new areas that presently affect shoppers and are likely to do so in the future. The survey commences in January of each year.

The 1993 *Trends* continues to explore general shopping behavior, food safety and nutrition. Wherever possible, comparisons are made with previous year's findings. These topics include:

- ▲ Expectations and evaluations of supermarket performance.
- ▲ Consumer expenditures in supermarkets and methods by which shoppers try to save money.
- ▲ Ways of economizing.
- ▲ Store utilization.
  - ▲ Frequency of trips to the supermarket
  - ▲ Store switching
  - ▲ Reasons for switching
- ▲ Awareness and use of store products and services.
- ▲ Private labels and store brands.
- ▲ Consumer attitudes toward nutrition.
- ▲ Consumer attitudes toward food safety.
- ▲ Consumer activism..
- ▲ Consumer attitudes toward responsibility for ensuring environmentally safe and friendly products.

The first *Trends* report, published in 1974, reported on the 1973 Pilot Study and Baseline Survey. *Trends 1993* provides a retrospective on how consumer grocery shopping habits and attitudes have changed over the past two decades. The final chapter of this year's report examines the evolving relationship between consumers and the supermarket industry in two areas: (1) consumer evaluations of supermarket responsibilities and (2) sources of gratification for supermarket shoppers.

Study Design

Data for this survey are based on telephone interviews with a representative, nationwide sample of 2,006 male and female supermarket shoppers. Shoppers were randomly assigned to one of two versions of the questionnaire: (1) Shopping Habits or (2) Food Safety/Nutrition. This was done to shorten the length of the interview. Unless otherwise noted, questions were asked of 1,000 shoppers. The survey was conducted in January and February 1993.

In keeping with the 1991 and 1992 *Trends* surveys, data are *not* weighted. Rather, unweighted data are used throughout the report and all percentages are projectable to the U.S. shopping public as a whole.

A demographic profile of respondents and details of the survey methodology can be found in the Methodology chapter at the end of this report.

Notes on Reading the Tables

For each table the wording of the question appears as it was asked. Any changes in wording from previous years are noted in the table.

Directly beneath the title of each table is a description of the base—that is, the group of respondents answering each question. The exact number of respondents in this base group, either in total or for shopper sub-categories, is provided as appropriate. On many tables, the category "don't know/refused" is omitted; therefore, the number of respondents may not add to the total base. The percentages in each table are calculated using this base number. Percentages may not total to 100 percent due to rounding or the acceptance of multiple responses.

For some tables, the response categories are presented both separately (e.g., very important,

somewhat important) and combined (e.g., very important or somewhat important). In some instances, the separate percentages may not add up to the combined ones due to rounding.

All reported comparisons are statistically significant except where labeled as tendencies. (See the Methodology chapter of this report for a discussion of sampling error.)

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SURVEY HIGHLIGHTS

The economy remains foremost on shoppers' minds in 1993. When asked to name the single most important issue facing our country today, the majority of all shoppers cite an economic issue (53 percent). One out of five (20 percent) names unemployment—about twice the percentage who cite any other issue. This response is down eight points from 1992, while health care costs (11 percent) and budget costs (10 percent) are up six percentage points each. Inflation or the high cost of living is most important to 7 percent of consumers.

Nearly one-quarter of consumers (24 percent) say that social issues are most pressing. These include the breakdown of the family unit, loss of values, homelessness, crime, education, poverty, drugs, racial discrimination, hunger in the U.S., AIDS and abortion.

Methods of Economizing and Consumer Expenditures in Supermarkets

▲ The factors that shoppers consider very or somewhat important remain essentially unchanged in 1993. The top 10 factors are the same as in 1992, although their order has changed slightly. Shoppers continue to place the greatest emphasis on *Quality produce;* a *Clean, neat store; Good variety or wide selection; Good, low prices; Good quality meat;* and *Courteous, friendly employees.* These factors were mentioned by at least 95 percent of those surveyed. One new item, *Use-by/best-if-used-by date marked on products,* was also cited by 95 percent.

▲ Weekly family grocery expenditures are nearly on a par with last year, averaging $80, up only $2. Average per-person expenses of $31 are up $1 since 1992.

▲ Although shoppers continue to search for ways to economize, their efforts have fallen off slightly from 1992, perhaps reflecting some improvement in their outlook for the future. On nearly every shopping trip, two in five shoppers now look in the newspaper for specials (down five points to 40 per-

WHAT SHOPPERS' BELIEVE TO BE THE SINGLE MOST IMPORTANT ISSUE FACING OUR COUNTRY TODAY

Q: *Now, turning to another subject, I would like you to think about the problems facing our country today. What do you think is the single most important issue facing our country today?*

	Jan. 1992 Total	Jan. 1993 Total
Base	2,000	1,000
	%	%
Economic Issues (NET)	53	53
Unemployment/lack of good paying job	28	20
Health care costs	5	11
Budget Deficit	4	10
Inflation/high cost of living	5	7
The economy	x	3
Taxes	2	2
Trade deficit	3	*
Recession	6	*
Social Issues (NET)	28	24
Breakdown of family unit/lack of morals/ religious faith/values/ work ethics	5	6
Homelessness	6	4
Crime	3	3
Education	4	3
Poverty	4	2
Drugs	4	2
Racism/discrimination/ equal rights	1	2
Hunger in U.S.	x	1
AIDS	3	1
Abortion	x	1
Environmental Issues (NET)	7	5
Protection of the environment	6	5
Disposal of waste	*	*
World Affairs (NET)	x	4
War/peace	x	2
Helping foreign countries before helping people in the U.S.	x	1
Foreign affairs/policy	x	1
Iraq/Saddam Hussein	x	*
Government Issues (NET)	4	2
The government/corrupt/ wastes money/does not help people	4	6
Other	4	2
Don't know	4	7

* = Less than 0.5 percent.
x = Not mentioned.
May not total 100 percent due to rounding.

cent) or use price-off coupons (down seven points to 36 percent). Two economizing measures are used slightly more often: shopping only at one store (up three points to 45 percent) and stocking up on bargains (up two points to 28 percent). Despite club stores' claims of lower everyday prices, few consumers shop regularly at stores like B.J.'s, Costco, Sam's or Price Club (2 percent, unchanged from 1992). Only 9 percent of the sample report shopping at club formats more often over the last year, while 21 percent report shopping at these formats less frequently.

▲ Shoppers use a variety of measures to reduce grocery expenditures or decrease waste at home. To save at the supermarket, more than half buy fewer luxury or gourmet items (60 percent), use price-off coupons (59 percent) or buy fewer convenience foods (56 percent). Consumers also stretch their food dollar by doing more with leftovers (59 percent) and eating out less often (54 percent).

▲ Shoppers economize through buying private label or store brands, rather than nationally advertised brands. About two-thirds say it is important for stores to carry private labels or store brands. One in five (19 percent) says they buy these items pretty much every time they shop, and 88 percent do so at least occasionally.

▲ In keeping with last year, about one in five shoppers can be classified as a "heavy economizer" (those who practice at least five economizing measures). Heavy economizers are more likely to be female, married and living in one-income households. They are younger (under age 50) than other shoppers and have children living at home. While the average weekly grocery expenditure of $77 is $3 less than the $80 reported for all shoppers, they spend $2 less per person than others ($29 vs. $31).

Expectations and Evaluation of Supermarket Performance

▲ Shoppers continue to be pleased with the job their supermarket is doing. The average rating of 8.0 on a scale of one to 10 (where one means poor and 10 means excellent) increased slightly from the 7.9 rating in 1992. Those giving their primary supermarket a score of 9 or 10 rose from 33 percent to 36 percent this year.

▲ Supermarkets have responded to consumers' needs to stretch their budgets, and this is reflected in the survey. Those giving their principal supermarket an excellent or good rating in providing *Good, low prices* increased significantly this year (up four points to 77 percent).

▲ *Quality produce* and a *Clean, neat store* are the most important attributes in selecting a supermarket. As in past years, the vast majority of shoppers (at least 95 percent) place importance on *Good variety and wide selection; Good, low prices; Good quality meat; Courteous, friendly employees;* and *Use-by/best-if-used-by date marked on product.* A *Convenient location,* which was in the 95 percent category last year, fell slightly to 93 percent for 1993. Shoppers continue to value *Readable and accurate shelf tags* (94 percent) and *Items on sale or money-saving specials* (91 percent) as much as in past years. Consumer satisfaction with supermarkets' efforts to help shoppers stretch their budgets is reflected in the number who attach importance to *Private label or store brands* (unchanged at 65 percent after the 10-point increase in 1991.)

▲ Supermarkets receive favorable performance evaluations on key items. At least nine out of 10 shoppers say supermarkets are excellent or very good on a *Clean, neat store; Convenient location;* and *Courteous, friendly employees.* At least four out of five also rate as good or excellent *Quality produce; Good variety or wide selection; Fresh food sections like a deli or bakery; Good quality meat; Convenient store layout; Items on sale or money-saving specials; Environmental programs;* and *Nutrition and health information available to shoppers.* Reflecting a general increase in satisfaction levels this year, of 19 ratings tracked in both 1992 and 1993, five increased and the remainder held steady.

Shopping Patterns

▲ Shoppers continue to average just over two trips to the supermarket in a typical week, unchanged from 1992.

▲ Customers remain loyal to their primary supermarket (75 percent), although economic concerns may force changes. Concern over *Better or lower prices* (40 percent) continues to prompt more store switching than a *Convenient location* (31 percent). *More variety and selection* also remains a key reason for changing supermarkets (21 percent, down 4 points). Shoppers now appear to be focusing on product quality such as *Better quality products or store* (12 percent, up eight points) and *Better meats* (up two points to 10 percent), as well as *Store cleanliness* (10 percent).

▲ Fast-food restaurants dominate all other outlets as a source of takeout food, although it is true that this source has decreased significantly since 1992 (down nine points to 46 percent). About one in four consumers continues to order food from restaurants (27 percent, up three points) and 15 percent buy takeout from a supermarket (also up three points).

New Products and Services

▲ Supermarkets appear to be doing a good job in anticipating the need for new products and services. Products that are the most widely available also are the ones that are used most often. Products with limited availability are not only used less often when available, but are not likely to be used with any great frequency at those supermarkets that carry them.

▲ Nearly all shoppers report their supermarkets offer private label or store brands (90 percent, down five points) and a deli or other carryout foods (down one point to 86 percent). Other items with reported widespread availability include gourmet or specialty foods (67 percent, down six points), a floral department (down two points to 67 percent) and unpackaged or bulk food (up four points to 65 percent).

▲ Videos or movies are said to be offered for rent (48 percent) more often than for sale (44 percent). With penetration of 42 percent, prescription drug counters are now perceived to be more widely available than they were three years ago (30 percent). Supermarket acceptance of credit cards for payment increased by eight percentage points to 41 percent.

▲ Items that shoppers say they are most likely to purchase on a weekly basis include: private label or store brands (42 percent, down nine points), deli items (24 percent, down four points), and unpackaged or bulk food (23 percent, down six points).

▲ Among shoppers who say their supermarket does not carry a particular product or service, only private label or store brands (22 percent) was mentioned by more than one out of five shoppers. The only other items mentioned by more than one in eight shoppers were video movies for rent rather than for sale (18 percent), a full-service, in-store bank (17 percent), a deli or carryout items (15 percent) and unpackaged or bulk food (15 percent).

Consumer Activism

▲ Consumer activism remains high in 1993, manifest in the refusal to buy products because of cost, the manufacturer's social policies or the unethical treatment of animals. Economic concerns are the predominant motivator: 89 percent have refused to buy products that cost too much, down sightly from 90 percent last year. Over half (59 percent) have sought out products with recyclable packaging, or refused to buy products from manufacturers they disagreed with (53 percent). More than four in 10 refused to buy products where ethical treatment of animals may be called into question.

▲ Consumers continue to rely on manufacturers and food processors (35 percent) and government institutions or agencies (27 percent) for ensuring that food and nonfood products in the supermarket are environmentally safe and friendly. Only one in 10 relies on their food store for ensuring food safety. Compared with last year, shoppers rely less on government agencies and food stores, but more on manufacturers and food processors.

Nutrition

▲ Shoppers continue to be less than fully satisfied with the healthfulness of their diet. Two out of three (67 percent) believe that their diet could be at least somewhat healthier, and only one in 10 says it is as healthy as it could possibly be. Nevertheless, 62 percent report eating more fruits and vegetables, an increase of two points from 1992. This category continues to be the predominant approach to keeping a diet healthy. About three in 10 say they eat less red meat (30 percent, down one point from 1992) or consume less fats and oils (26 percent, down two points from 1992).

▲ Shoppers use somewhat different nutritional strategies than a year ago. The number who directly reduce their cholesterol intake continued to decline (down two points to 6 percent), and the consumption of cholesterol-rich foods, such as dairy products, reversed last year's increase by declining three points to 4 percent.

▲ Taste remains the most important factor when shopping for food. The gap between those reporting taste and nutrition as very important factors widened to 16 percent in 1993 (up four points). Nonetheless, at least 97 percent of all shoppers feel nutrition is at least somewhat important.

▲ Nutritional concern remains high but has fallen slightly from last year (down two points to 75 percent). Fat content (54 percent, up four points) and salt content (26 percent, up five points) led as the biggest concerns. Cholesterol fell from second to third position, declining seven points to 23 percent. This represents a 21-point decline since the 1990 survey.

Fat content is reported to be at least somewhat of a concern by more than four times as many respondents to the current survey as compared with the 1985 survey. Fats (57 percent) and cholesterol (51 percent) are also considered the two most serious health hazards.

▲ Half of shoppers report that they always read food labels for ingredients when purchasing an item for the first time. This rate falls significantly to less than one-third (32 percent) for all subsequent purchases. Nearly as many (47 percent) always read the food label for nutritional content on the first purchase. This rate also falls to less than one-third (32 percent) on any subsequent purchase.

▲ Fat content is the single most sought information when reading a food label on both the first (31 percent) and any subsequent purchase (30 percent). Other nutritional information appears to become more important on subsequent purchases. Calorie content (up 10 points to 21 percent), sodium content (up 13 points to 22 percent), nutrition content (up six points to 14 percent), sugar content (up eight points to 15 percent), cholesterol level (up 11 points to 17 percent), and artificial ingredients or preservatives (up nine points to 14 percent) all show significant increases in shopper review for subsequent purchases.

▲ An increased proportion of shoppers assumes primary responsibility for food nutrition (42 percent, up three points). Continuing the trend first seen in 1990, shoppers rely less on the government (13 percent) for ensuring the products they buy are nutritious. Manufacturers (25 percent, down two points) and food stores (4 percent, down three points) are less likely to be perceived as responsible for nutritious products. Reliance on consumer groups increased three points to 7 percent, a return to the level of 1990.

Consumer Attitudes Toward Food Safety

▲ Shopper confidence in the safety of the food supply has failed to regain its 1991 level. After the record high in January 1991 (82 percent) followed by a 10-point drop to 72 percent in 1992, confidence recovered only one point to 73 percent in 1993.

▲ Spoilage is believed to be the most prominent threat to food safety. In fact, spoilage concerns increased by 10 points to 46 percent in 1993. Related to this is increased concern over product freshness, shelf life and expiration dates (up eight points to 20 percent); spoilage and germs (up three points to 18 percent); and improper packaging and canning (up three points to 13 percent). Other items that increased, although not significantly, are processing and food preparation (up two points to 12 percent); unsanitary handling by supermarket employees (up two points to 10 percent); and tampering (up one point to 7 percent).

▲ Residues such as pesticides and herbicides continue to be rated the preeminent health hazard, with the proportion of shoppers who say it is a "serious" hazard increased (up three points to 79 percent). Antibiotics and hormones in poultry and livestock is considered a serious hazard by one in two (55 percent). The percentage of shoppers who view irradiated foods as a serious hazard remained unchanged (35 percent).

▲ Responsibility for food safety did not change in the past year. Consumers place the most faith in their own ability to ensure the safety of the foods they buy (38 percent). About half as many rely on either manufacturers (21 percent) or the government (20 percent). Only a small number feel this is up to food stores (10 percent).

Looking Back Over 20 Years

▲ In the past 20 years, consumer confidence in supermarkets has increased immensely. A majority of shoppers in 1993 feel their supermarkets are looking after their customers in terms of food safety, freshness and honest dealings with customers. The largest gains in consumer protection measures in the past 20 years have been made in making sure that store advertisements are honest and not exaggerated, helping people to stretch their food dollar, and ensuring freshness of products—each one is up by more than 30 points. At least two-thirds of customers now say that supermarkets are doing the right amount when it comes to readable labels, unit price information, freshness of products, food safety and honest ads.

▲ One area of suggested improvement is teaching people more about nutrition; 53 percent say supermarkets are "doing too little."

▲ Of a list of seven sources of shopping gratification, shoppers are most likely to say that workers are almost always pleasant and friendly and that they almost always feel they have done a good job of managing their money and budgeting well. Shoppers are less likely to say they have found an unexpected bargain, are excited about trying a new product or have gotten pleasure out of an impulse purchase.

▲ Supermarkets may be able to enhance the shopping experience by providing shoppers with ideas on what to serve and hints on feeding the family better. More than eight in 10 shoppers say these things never or only occasionally happen during the shopping experience.

▲ Shoppers today are more sophisticated about their expectations of supermarket performance, and supermarket performance has improved to meet customer needs. Technological advancements in such areas as food processing, food safety, speed of delivery, electronic checkout and inventory control have brought supermarkets closer to their customers' expectations. In the future, supermarkets will need to listen to the customer in order to find new pathways for marketing and sales development.

CHAPTER 1

HOW CONSUMERS VIEW THE SUPERMARKET

SHOPPER EXPECTATIONS

When evaluating their primary supermarket, shoppers place the greatest importance on *Quality produce* and a *Clean, neat store.* As in earlier years, shoppers continue to be consistent in the criteria they use to evaluate a store. *Good variety or wide selection; Good, low prices; Good quality meat;* and *Courteous, friendly employees* remain at the forefront, along with *Use-by/best-if-used-by date marked on products,* newly added this year (see Table 1).

In spite of the recession, the importance of price did not increase in 1993 (96 percent versus 97 percent in 1992.)

Nine out of 10 shoppers also place great importance on *Readable and accurate shelf tags,* a *Convenient location, Fast checkout* and *Items on sale or money-saving specials.*

Four in five look for the *Availability of health and nutrition information, Attention to special requests or needs* and a *Convenient store layout.* Three-quarters want a *Fresh foods section,* and at least two-thirds value a *Good selection of nonfood products, Environmental programs* and *Private label or store brands.*

Compared with last year, only one item—*Fresh seafood selection*—increased in importance (up four points to 64 percent in 1993.) This is about the same importance as in 1990 when consumers were first asked about this item.

The least important features—as mentioned by half or fewer—are *24-hour operation* (50 percent) and an *In-store pharmacy* (42 percent).

This is the seventh consecutive year in which *Trends* asked shoppers to rate the importance of supermarket selection factors. One new item was added this year: *Use-by/best-if-used-by date on products.* This is important to nine out of 10 shoppers.

TABLE

▲ 1 ▲

HOW WELL SUPERMARKETS MEET CONSUMER EXPECTATIONS, 1989–1993

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important, or not at all important to you when you select a primary food store.*

Q: *Now I'm going to read the same list of factors and ask you to tell me how well the supermarket in which you usually shop does on each one. For each factor, please tell me whether your supermarket does an excellent, good, fair, or poor job of having (READ EACH ITEM).*

Base: 1,000 shoppers

	Very or Somewhat Important					Excellent or Good Rating				
	1989	1990	1991	1992	**1993**	1989	1990	1991	1992	**1993**
	%	%	%	%	%	%	%	%	%	%
Quality produce (fruits and vegetables)	98	98	99	99	**99**	85	88	88	87	**89**
Clean, neat store	x	x	x	100	**99**	x	x	x	92	**93**
Good variety or wide selection	96	97	98	97	**97**	86	89	87	90	**89**
Good, low prices	92	96	96	97	**96**	71	66	65	73	**77**
Good quality meat	95	96	95	96	**96**	84	86	83	84	**84**
Courteous, friendly employees	94	94	96	96	**95**	85	87	87	87	**90**
Use-by/Best-if-used-by date marked on products	x	x	x	x	**95**	x	x	x	x	**x**
Readable and accurate shelf tags	92	92	91	94	**94**	72	70	72	73	**76**
Convenient location	91	92	93	95	**93**	89	88	90	91	**91**
Fast checkout	88	89	91	91	**91**	71	69	67	72	**75**
Items on sale or money-saving specials	84	85	88	91	**91**	77	77	78	83	**82**
Nutrition and health information available for shoppers (N = 670)[1]	84	84	86	84	**85**	55	75	71	75	**80**
Attention to special requests or needs	x	x	x	85	**84**	x	x	x	70	**70**
Convenient store layout	76	77	79	80	**81**	83	83	83	85	**84**
Fresh food sections like a deli or bakery (N = 906)[2]	76	72	73	78	**76**	81	87	88	87	**88**
Good selection of nonfood products	x	x	x	70	**72**	x	x	x	77	**78**
Environmental programs (N = 516)[1]	x	x	72	71	**72**	x	x	76	78	**81**
Private label or store brands (N = 920)[1]	x	54	55	65	**65**	x	74	73	76	**77**
Fresh seafood section (N = 698)[1]	x	63	60	60	**64**	x	75	74	69	**77**
24-hour operation[1]	x	45	45	49	**50**	x	x	x	x	**x**
Pharmacy (N = 434)[1]	x	37	37	41	**42**	x	58	66	70	**69**

x = Not asked.

[1]Beginning in 1990, the supermarket's performance on selected items was rated only by those whose supermarket has the specified feature. In earlier years, these items were asked of all respondents. "N" reflects the number of people who say their store has these items. it pertains only to the good or excellent rating for 1993.

[2]In 1989, shoppers were asked to rate "specialty food sections like a deli, bakery or fresh fish."

Women place greater importance than men on one-third of the rated supermarket features (see Table 2), of which two reflect cost-consciousness: *Items on sale or money-saving specials* and *Private label or store brands.*

Women are also more likely to place emphasis on value-added services, particularly *Attention to special requests or needs; Receiving nutrition and health information; Fresh food sections,* (e.g., deli, bakery); *Good selections of nonfood products;* and *Environmental programs.* A *Convenient store layout* is also significantly more important to women than to men.

TABLE
▲ 2 ▲
IMPORTANCE OF SUPERMARKET FEATURES, BY GENDER

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important, or not at all important to you when you select a primary food store.*

	Jan 1993 Total	Men	Women		
			Total	Working	Nonworking
Base	1,000	259	741	401	336
Very or Somewhat Important	%	%	%	%	%
Quality produce (fruits and vegetables)	99	99	100	100	99
Clean, neat store	99	96	100	100	100
Good variety or wide selection	97	96	98	98	98
Good, low prices	96	95	97	97	97
Good quality meat	96	93	97	97	96
Courteous, friendly employees	95	93	96	96	97
Use-by/best-if-used-by date market on products	95	93	96	96	96
Readable and accurate shelf tags	94	91	95	94	96
Convenient location	93	92	94	95	93
Fast checkout	92	90	92	93	91
Items on sale or money-saving specials	91	84	93	93	93
Nutrition and health information available for shoppers	85	77	88	87	88
Attention to special requests or needs	84	76	87	85	88
Convenient store layout	81	74	84	83	84
Fresh food sections like a deli or a bakery	76	71	78	80	76
Good selection of nonfood products	72	66	74	74	74
Environmental programs	72	64	74	76	73
Private label or store brands	65	59	67	66	67
Fresh seafood section	64	62	64	62	68
24-hour operation	50	50	50	54	45
Pharmacy in store	42	39	44	42	46

Having access to the supermarket 24 hours a day is important to selected consumer groups, especially working women, people under 40 years old, and those from large households. The majority of working women value 24-hour operations (54 percent vs. 45 percent of nonworking women). Age is inversely related to need for 24-hour operations (Table 3): The majority aged 18 to 39 want this, compared with four out of 10 of those who are older. Table 4 shows that the larger the household size, the greater the need for 24-hour store operation.

The importance of core supermarket features (cleanliness, cost, variety and quality) varies little among shoppers of different ages (see Table 3). Three-quarters or more of all age groups say that the top 14 items are very or somewhat important. Young shoppers are more likely to care about a *Good selection of nonfood products, Environmental programs* and *24-hour operation;* people 65 years and older are more likely to care about *Availability of nutrition and health information, Private labels or store brands* and a *Fresh seafood section.*

Store features relating to cost savings and convenience clearly differentiate shoppers who live alone from those in larger households (see Table 4). In general, one-person households tend to place less importance on many features; larger households are more likely to care about *Attention to special requests or needs, Good selection of nonfood products* and *24-hour operations.*

Overall, this year's evaluation of supermarket performance shows a general increase over 1992. Of 19 ratings tracked in both 1992 and 1993, five showed significant increases and the remainder held steady.

TABLE
▲ 3 ▲

IMPORTANCE OF SUPERMARKET FEATURES, BY AGE

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important, or not at all important to you when you select a primary food store.*

	Jan. 1993 Total	Age				
		18–24	25–39	40–49	50–64	65+
Base	1,000	66	356	205	216	149
Very or Somewhat Important	%	%	%	%	%	%
Quality produce (fruits and vegetables)	**99**	100	99	99	100	100
Clean, neat store	**99**	99	98	99	100	99
Good variety or wide selection	**97**	100	98	97	96	96
Good, low prices	**96**	97	97	96	96	96
Good quality meat	**96**	96	96	95	94	98
Courteous, friendly employees	**95**	99	94	93	96	97
Use-by/best-if-used-by date market on products	**95**	96	96	95	94	95
Readable and accurate shelf tags	**94**	88	92	92	97	96
Convenient location	**93**	94	94	94	92	93
Fast checkout	**92**	91	93	92	91	89
Items on sale or money-saving specials	**91**	94	90	89	92	91
Nutrition and health information available for shoppers	**85**	77	83	85	86	89
Attention to special requests or needs	**84**	92	79	84	86	89
Convenient store layout	**81**	80	79	82	83	83
Fresh food sections like a deli or a bakery	**76**	80	79	76	75	73
Good selection of nonfood products	**72**	79	76	73	65	66
Environmental programs	**72**	77	72	74	72	66
Private label or store brands	**65**	62	62	66	63	73
Fresh seafood section	**64**	56	63	65	63	70
24-hour operation	**50**	71	56	48	43	37
Pharmacy in store	**42**	50	42	41	37	51

Supermarket Performance

In nearly nine out of 10 cases, supermarkets meet shoppers' expectations with respect to:

▲ *Clean, neat store* (93 percent).

▲ *Convenient location* (91 percent).

▲ *Courteous, friendly employees* (90 percent).

▲ *Good variety or wide selection* (89 percent).

▲ *Quality produce* (89 percent).

▲ *Fresh food sections like a deli or bakery* (88 percent).

Although supermarket performance ratings continue to fall below importance ratings, four of the six items of greatest importance are also the ones on which shoppers most favorably rate supermarket performance:

▲ *Clean, neat store* (93 percent).

▲ *Courteous, friendly employees* (90 percent).

▲ *Good variety or wide selection* (89 percent).

▲ *Quality produce* (89 percent).

At least four out of five shoppers rate supermarket performance good or excellent on these additional features:

▲ *Convenient store layout* (84 percent).

▲ *Good quality meat* (84 percent).

▲ *Items on sale or money-saving specials* (82 percent).

▲ *Environmental programs* (81 percent).

▲ *Nutrition and health information available to shoppers* (80 percent).

TABLE
▲ 4 ▲

IMPORTANCE OF SUPERMARKET FEATURES, BY HOUSEHOLD SIZE

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important, or not at all important to you when you select a primary food store.*

	Jan. 1993 Total	Household Size			
		One	Two	Three-Four	Five Or More
Base	1,000	149	361	362	118
Very or Somewhat Important	%	%	%	%	%
Quality produce (fruits and vegetables)	99	99	100	99	98
Clean, neat store	99	97	99	99	99
Good variety or wide selection	97	97	96	99	98
Good, low prices	96	96	96	97	98
Good quality meat	96	93	96	97	94
Courteous, friendly employees	95	93	96	96	97
Use-by/best-if-used-by date market on products	95	96	96	95	94
Readable and accurate shelf tags	94	97	94	92	92
Convenient location	93	95	93	93	94
Fast checkout	92	95	93	93	94
Items on sale or money-saving specials	91	88	90	92	92
Nutrition and health information available for shoppers	85	81	84	87	87
Attention to special requests or needs	84	77	86	86	83
Convenient store layout	81	79	81	82	82
Fresh food sections like a deli or a bakery	76	72	74	81	76
Good selection of nonfood products	72	65	70	74	79
Environmental programs	72	74	70	72	71
Private label or store brands	65	60	66	64	69
Fresh seafood section	64	59	66	63	65
24-hour operation	50	46	46	52	59
Pharmacy in store	42	46	42	40	48

About three-quarters rate performance good or excellent on:

- ▲ *Good selection of nonfood products* (78 percent).
- ▲ *Good, low prices* (77 percent).
- ▲ *Private labels or store brands* (77 percent).
- ▲ *Fresh seafood section* (77 percent).
- ▲ *Readable and accurate shelf tags* (76 percent).
- ▲ *Fast checkout* (75 percent).

Seven out of 10 give ratings of good or excellent to *Attention to special requests or needs* (70 percent) and an *In-store pharmacy* (69 percent).

Supermarkets are making strides in meeting shoppers' expectations on key issues (see Table 1). Over the past two years, when economic issues such as unemployment and recession have been foremost in shoppers' minds, significantly more consumers have felt that their principal supermarket is addressing their cost concerns. Shoppers continue to rate their supermarket more favorably than ever for *Items on sale or money-saving specials* (up four points in two years to 82 percent) and *Good, low prices* (up 12 points to 77 percent in two years).

Consistent with prior years, the importance shoppers place on supermarket features exceeds performance ratings for the top 12 items. Performance ratings exceed expectations for the seven least important items (see Table 1).

Overall Satisfaction With Supermarkets

Level of satisfaction with the job their principal supermarket is doing in meeting grocery shopping needs has increased since 1992. This year 36 percent give their supermarket the top two ratings (9 or 10 on a scale of 1 to 10, where "one" indicates their supermarket is doing a poor job and "10" an excellent job)—up three points from 1993. The average rating for 1993 is 8.0 (Tables 5 and 6).

TABLE
▲ 5 ▲

CONSUMERS' OVERALL SATISFACTION WITH THEIR PRINCIPAL SUPERMARKET, 1989–1993

Q: *All things considered, how satisfied are you with the job the supermarket in which you usually shop is doing with respect to meeting your grocery shopping needs? Please use a scale of one to 10, where "one" means it is doing a poor job, and "10" means it is doing an excellent job. Use any number between and including one to 10.*

Base: 2,006 shoppers

	Average Rating (1 to 10 Scale)					Percentage Rating Supermarket 9 or 10				
	1989	1990	1991	1992	**1993**	1989	1990	1991	1992	**1993**
						%	%	%	%	%
Total	7.9	7.9	7.9	7.9	**8.0**	32	29	32	33	**36**
Gender										
Men	7.7	7.7	7.7	7.6	**7.8**	25	22	24	23	**32**
Women	7.9	7.9	8.1	8.0	**8.0**	33	31	35	36	**38**
Working	7.9	7.8	8.0	7.8	**7.9**	31	28	31	30	**43**
Nonworking	7.9	8.1	8.1	8.2	**8.2**	36	35	38	43	**43**
Type of Household										
With children	7.8	7.7	7.9	7.8	**7.9**	30	24	29	30	**33**
No children	8.0	8.0	8.0	8.0	**8.1**	33	33	33	35	**39**
Size of Household[1]										
1	8.0	8.1	7.8	8.1	**8.2**	38	37	33	35	**43**
2	8.0	8.0	8.0	8.0	**7.9**	31	33	34	36	**37**
3	7.8	7.8	N/A	N/A	**N/A**	32	26	N/A	N/A	**N/A**
4	7.7	7.7	7.9	7.8	**7.9**	29	23	29	30	**33**
5 or more	7.8	7.7	8.0	7.8	**7.9**	31	25	35	31	**37**
Age										
10–24	7.7	7.8	7.6	7.7	**7.6**	21	28	20	26	**26**
25–39	7.8	7.7	7.8	7.7	**7.8**	27	21	26	26	**29**
40–49	7.8	7.8	8.0	7.8	**7.9**	35	27	33	29	**36**
50–64	8.0	8.1	8.1	8.2	**8.2**	35	38	35	40	**42**
65 and older	8.2	8.3	8.3	8.5	**8.4**	43	43	47	50	**52**

[1]Beginning in 1991, household size of three and four persons were combined.

Since 1992, satisfaction levels have increased significantly among:

▲ Men

▲ Working women

▲ One-person households

▲ Households with and without children

▲ Households of five or more

▲ Those 40 to 49 years old

▲ Middle-income groups earning $15,000-$50,000

▲ Those with a high school education or less

A closer look at this year's satisfaction ratings reveals that the vast majority of shoppers rate their supermarket as an "8" or higher. Low scores (1-5) are reported by fewer than one in 10 shoppers.

1993 Ratings	Percent	Cumulative Percent
10	19%	19%
9	17%	36%
8	34%	70%
6–7	21%	91%
1–5	9%	100%

What distinguishes satisfaction from dissatisfaction? To answer that, we compare those who are highly satisfied (9-10 ratings) with those who are less satisfied (1-8). In 1993, demographics remained a major factor (Tables 5, 6):

▲ Women, particularly the nonworking, are more pleased with supermarket performance than men.

▲ Smaller households and those without children are more satisfied than others.

▲ Age is directly related to satisfaction. One in two shoppers aged 65 or older rates their supermarket a "9" or "10," compared with only one in four under age 40.

▲ Satisfaction is inversely related to total household income and education. Satisfaction is highest among shoppers with household incomes of $15,000 or less and declines as income rises. Only one in three gives high ratings among those with household incomes over $35,000.

▲ Shoppers with a high school degree or less are more satisfied than those with at least some college education.

TABLE
▲ 6 ▲

CONSUMERS' OVERALL SATISFACTION WITH THEIR PRINCIPAL SUPERMARKET, 1990–1993

Q: *All things considered, how satisfied are you with the job the supermarket in which you usually shop is doing with respect to meeting your grocery shopping needs? Please use a scale of one to 10, where "one" means it is doing a poor job, and "10" means it is doing an excellent job. Use any number between and including one to 10.*

Base: 2,006 shoppers

	Average Rating (1 to 10 Scale)				Percentage Rating Supermarket 9 or 10			
	1990	1991	1992	**1993**	1990	1991	1992	**1993**
					%	%	%	%
Total	7.9	7.9	7.9	**8.0**	29	32	33	**36**
Income								
$15,000 or less	8.0	8.0	8.2	**8.1**	39	42	41	**42**
$15,001–$25,000	7.9	8.1	7.9	**8.0**	29	35	33	**37**
$25,001–$35,000	7.7	7.9	7.8	**7.9**	24	29	28	**34**
$35,001–$50,000	7.9	7.8	7.7	**7.8**	23	25	27	**30**
$50,001 or more	7.7	7.8	7.8	**7.8**	25	25	31	**81**
Education								
High school or less	8.0	8.1	8.0	**8.1**	36	37	37	**41**
Some college/college graduate	7.7	7.8	7.9	**7.8**	21	27	29	**32**

TABLE
▲ 7 ▲

HOW CONSUMERS WOULD IMPROVE THEIR PRINCIPAL SUPERMARKET

Q: *Overall, what improvements, if any, would you like to see in the supermarket where you usually shop for food? (Verbatim responses coded to categories listed below; multiple answers accepted.)*

	Jan. 1992 Total	Jan. 1993 Total
Base	2,000	2,006
In-Store Features/Services (NET)	NA	26%
Faster checkouts/more cashiers	14%	26%
Better layout/easier to shop/more space/wider aisles	8	6
More readable/accurate shelf tags/prices on individual items	X	2
Better stocked shelves/more consistent stocking/inventory	2	2
Recycling/environmental programs/products	x	1
Open longer hours	x	1
Better-in-store signs	2	1
Quicker to shop	x	1
Easier payment system	x	1
More Variety/Better Assortment/Wider Choice (NET)	22%	25%
More variety/better assortment/wider choice (nonspec.)	13%	15%
Specific services (sub-net)	x	1
Add pharmacy	x	1
Better deli/add deli	x	1
Baggage service	x	1
Better bakery/add bakery	x	1
Add bank	x	1
Add fresh seafood section	x	*
Add video/film department	x	*
Other specific services	x	2
Specific food (sub-net)	6%	6%
Specialty items/gourmet/imported/diet foods	x	2
More private label/store brands	2	1
More prepared/ready-to-eat foods	x	1
More selection/variety produce	x	1
More selection/variety seafood	x	1
Better meat selection	x	*
Other specific food	x	1
Cost Savings/prices (NET)	NA	15%
Lower prices	13%	12%
More items on sale/money-saving specials	3	4
Better Customer Service/Employees (NET)	NA	8%
More help in the store/courteous help	3%	4%
Better service (nonspecific)	4	3
More attention to special requests and needs	2	1
More knowledgeable employees	2	1
Store Facilities/Grounds/Parking (NET)	NA	7%
Cleaner/neater	4%	3%
Better parking	2	2
Better decor	x	1
Location/closer to my home	x	1
Better security	x	*
Offer Better Quality Products (NET)	NA	6%
Offer better quality products	5%	3%
Better quality produce	x	1
Better meats	x	1
Better quality/fresher seafood	x	1
Other products	x	*
Fresher products	5%	6%
Other	5	4
None	22	23
Don't know	10	9

* = Less than 0.5 percent
x = Not mentioned
NA = Due to multiple responses accepted, data for 1992 (NET) values are not available.

Suggested Improvements in Principal Supermarket

About two out of three shoppers would like to see improvements in their primary supermarket (see Table 7). One-quarter suggest improvements in store logistics (26 percent). One-quarter also desire more variety or a wider choice of products and services (25 percent).

In-store logistics includes services and store features that enhance the shopping experience. The key improvements suggested by shoppers here:

▲ Faster checkouts/more cashiers/more checkouts (13 percent).

▲ Better store layout/easier to shop/more space/wider aisles (6 percent).

About 15 percent called for more variety without specifying the changes they desired. Some of the specific requests:

▲ Specific services—pharmacy, deli, baggage service, bakery, bank, seafood section or video/film department (7 percent).

▲ Specific foods—specialty items (gourmet, imported, diet foods), prepared/ ready-to-eat foods, produce, seafood or meat (5 percent).

Changes or improvements in cost-savings features was mentioned by 15 percent of shoppers.

A total of 8 percent of shoppers expressed a desire for better customer service, more help in the store, courteous and knowledgeable employees and more attention to special requests.

Improvements in store facilities, grounds or parking were mentioned by 7 percent. These include a cleaner, neater store and better parking, decor, location or security (both in the store and parking lot).

Fresher products was mentioned by 6 percent of shoppers and better quality products, including produce, meats and seafood by 6 percent.

As noted in Table 1, shoppers view many of these conditions as being very important in selecting a supermarket. Likewise, supermarkets have begun to make strides in many of these areas, evident in the increased performance ratings.

CHAPTER 2

SPENDING AND SAVING MONEY

THE WEEKLY GROCERY BILL

For the first time since 1991, the average weekly grocery bill hit a new high, increasing by two dollars a week to $80 (Tables 8 and 9). In the past year, average per-person weekly grocery expenditures have remained fairly stable, rising only one dollar to $31 in 1993 (Table 10). Economies of scale prevail: per-person expenses decline as the size of the household increases. The per-person amount of $45 for one-person households is more than twice the $21 reported for households of five or more. Consistent with this finding, per-person expenses are lower in households with children than those without.

Geographically, average per-person expenses have increased in the Midwest, South and West and remained stable in the East.

Frequency of Using Money-Saving Measures

General economic conditions have prompted shoppers to more aggressively use money-saving measures. Shopping at only one store (45 percent) leads the list this year as the primary way shoppers economize (Table 11). Looking in the newspaper for grocery specials (40 percent) is second, down five percentage points from 1992. Price-off coupons (36 percent) is third, down seven points. About one in four shoppers

TABLE ▲ 8 ▲

WEEKLY FAMILY GROCERY EXPENSES, 1981–1993

Q: *About how much do you spend each week on groceries for your family?*
Base: 2,006 shoppers

	Total												
	Jan. 1981	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	Jan. 1991	Jan. 1992	**Jan. 1993**
	%	%	%	%	%	%	%	%	%	%	%	%	%
$0–$40	29	30	28	23	23	19	21	23	21	21	19	20	**19**
$41–$60	29	25	29	29	27	28	26	25	24	24	22	23	**23**
$61–$100	31	30	33	34	34	38	37	38	37	39	39	39	**37**
$101 and over	6	8	9	9	12	13	12	11	14	13	17	15	**17**
Not sure/ no answer/ refused	*	7	1	4	4	3	3	3	5	3	2	4	**5**
Average weekly grocery expenses	$55	$58	$62	$64	$68	$74	$72	$71	$74	$74	$79	$78	**$80**

May not add to 100 percent due to rounding.

TABLE ▲9▲

WEEKLY FAMILY GROCERY EXPENSES, BY SIZE OF HOUSEHOLD, 1982–1993

Q: *About how much do you spend each week on groceries for your family?*

Base: 2,006 shoppers

	Total											
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	Jan. 1991	Jan. 1992	Jan. 1993
	$	$	$	$	$	$	$	$	$	$	$	$
Size of Household												
1	33	36	40	40	41	33	38	40	39	43	44	45
2	51	54	59	58	62	58	61	63	63	71	66	68
3	70*	72*	71	76	76	77	74	80	82	92*	90*	92*
4	70*	72*	80	85	84	85	88	90	91	92*	90*	92*
5 or more	90	85	82	92	103	104	98	109	103	111	107	115

* Expenses for 1982, 1983, 1991, 1992 and 1993 are combined for three- and four-person households.

TABLE ▲10▲

AVERAGE PER-PERSON WEEKLY GROCERY EXPENSES, 1982–1993*

Base: 2,006 shoppers

	Total											
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	Jan. 1991	Jan. 1992	Jan. 1993
	$	$	$	$	$	$	$	$	$	$	$	$
Total	21	22	23	24	27	24	26	29	29	32	30	31
Married												
One wage-earner	20	20	22	23	25	23	24	26	26	28	28	29
Two wage-earners	22	22	23	23	26	25	25	26	28	31	27	30
Type of Household												
With children	19	19	19	21	21	21	22	23	22	26	24	25
No children	25	28	28	29	32	28	31	33	34	36	35	36
Size of Household												
1	33	36	40	40	41	33	38	40	39	43	44	45
2	26	27	29	29	31	27	29	31	32	35	33	34
3–4	20	21	22	23	23	23	23	25	25	27	26	26
5 or more	17	16	15	17	19	17	17	19	18	20	19	21
Region												
East	23	22	23	25	28	25	26	30	33	36	33	33
Midwest	20	20	22	21	25	22	25	26	26	28	27	28
South	20	24	23	24	26	25	26	28	28	31	29	31
West	23	24	24	26	27	24	29	31	28	35	31	34

*Caiculated from average weekly grocery expenses and household size. Respondents who couldn't provide data were omitted from the calculation.

TABLE ▲11▲

HOW OFTEN SHOPPERS ECONOMIZE, USE SUPERMARKET SPECIALS, COUPONS AND PRICE COMPARISONS, 1983–1993

Q: *How often do you (READ EACH ITEM)—pretty much every time you shop, fairly often, only occasionally, or never?*

Base, 1,000 shoppers

	Pretty Much Every Time You Shop										1993				
	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	Pretty Much Every Time	Fairly Often	Only Occasionally	Never	Not Sure
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Shop only at one store	x	x	x	x	x	x	x	x	x	42	45	25	13	16	1
Look in the newspaper for grocery specials	52	49	41	40	**	42	34	38	33	45	40	18	22	20	*
Use price-off coupons	38	39	30	39	37	40	35	37	36	43	36	22	30	12	*
Stock up on an item when you find a bargain	x	x	x	x	x	x	x	x	24	30	28	31	31	10	*
Compare prices at different supermarkets	30	29	27	25	23	26	23	24	20	25	23	20	29	29	*
Buy products on special even if you hadn't planned to buy them that day	x	x	x	x	x	x	x	x	17	18	20	30	39	11	*
Buy store brands or lower-priced brands instead of national brands***	x	x	x	x	x	x	x	x	18	18	19	31	38	11	1
Go to supermarkets other than your principal one for advertised specials	13	12	10	9	12	12	12	10	9	9	10	15	46	30	*
Shop at a discount or warehouse food store for grocery items	x	x	x	x	x	x	x	x	5	6	6	13	40	41	1
Shop at warehouse club stores like BJs, PACE, Price Club, Costco and Sam's	x	x	x	x	x	x	x	x	x	2	2	10	37	51	1

x = Not asked.
*Less than 0.5 percent.
**Not reported due to data anomaly.
***From 1983 to 1991, asked as "buy store brands or lower-priced products instead of national brands."

stocks up on bargains (28 percent) and compares prices at different supermarkets (23 percent), while one in five buys products on special (20 percent) and buys store brands or lower-priced brands instead of national brands pretty much every time they shop (19 percent).

Although one in four comparison shops at different supermarkets, only one in 10 economizes by going to supermarkets other than their principal one for advertised specials. Few shoppers shop at discount or warehouse food stores (6 percent) or at warehouse club stores (2 percent) pretty much every time as a means to economize. This latter finding is consistent with the large number who say they shop at only one store (45 percent).

Shoppers who buy store brands or shop at a warehouse club store were asked if their shopping habits had changed over the past year (Table 12). While the majority of each demographic group say their shopping practices have not changed over the past year, one in five are buying store brands or lower-priced brands more often and one in five are shopping less at a warehouse club store.

TABLE
▲12▲
HOW OFTEN SHOPPERS ECONOMIZE COMPARED WITH ONE YEAR AGO

Q: *Now I'd like you to think of your shopping habits over the past year. For each of the following items, please tell me whether you do it* more often, less *often, or about the* same *amount that you did a year ago.*

		Frequency of Activity			
	Base	More	Less	Same	Don't Know
		%	%	%	%
Buy store brands or lower-priced brands instead of national brands	211	21	11	65	3
Shop at a warehouse club store	86	9	21	62	8

Demographic differences in economizing are widespread. Nonworking women, older shoppers and those in larger households are predisposed towards money-saving measures (Tables 13 and 14). Many economizing practices are more prevalent among those with lower incomes or less formal education (Table 15). These and other differences are detailed below.

Shop Only at One Store

▲ Shoppers with high school education or less are more likely to do this than those with at least some college (Table 15).

▲ There are no distinguishing differences by gender, age, household size or geographic region.

TABLE
▲13▲

HOW USE OF SPECIALS, COUPONS AND PRICE COMPARISONS VARIES, BY GENDER AND REGION

Q: *How often do you (READ EACH ITEM)—pretty much every time you shop, fairly often, only occasionally, or never?*

		Gender				Region			
			Women						
	Total	Men	Total	Working	Non-Working	East	Midwest	South	West
	%	%	%	%	%	%	%	%	%
Base	1,000	259	741	401	336	179	308	293	220
Pretty Much Every Time									
Shop only at one store	45	41	46	47	44	41	49	44	41
Look in newspaper for grocery specials	40	26	45	38	52	46	47	32	36
Use price-off coupons	36	25	40	37	44	48	44	24	34
Stock up when you find a bargain	28	21	31	29	33	32	25	25	33
Compare prices at different supermarkets	23	15	25	20	31	27	20	21	25
Buy products on special even if you hadn't planned to	20	14	23	21	25	26	20	20	17
Buy store/lower-priced brands instead of national brands	19	15	20	20	19	17	19	18	21
Go to supermarkets other than your principal one for advertised specials	10	5	11	10	12	17	10	6	9
Shop at a discount or warehouse store for grocery items	6	7	6	6	5	3	7	6	8
Shop at warehouse club stores like BJs, PACE, etc.	2	3	2	2	2	1	1	3	4

TABLE
▲14▲

HOW USE OF SPECIALS, COUPONS AND PRICE COMPARISONS VARIES, BY AGE AND SIZE OF HOUSEHOLD

Q: *How often do you (READ EACH ITEM) pretty much every time you shop, fairly often, only occasionally, or never?*

		Age					Size of Household			
	Total	18–24	25–39	40–49	50–64	65 And Over	One	Two	Three-Four	Five Or More
	%	%	%	%	%	%	%	%	%	%
Base	1,000	66	356	205	216	149	149	361	362	118
Pretty Much Every Time										
Shop only at one store	45	47	47	42	42	45	46	38	49	48
Look in newspaper for grocery specials	40	35	33	37	42	59	32	42	42	40
Use price-off coupons	36	32	34	38	37	40	26	37	39	39
Stock up when you find a bargain	28	32	25	33	28	27	17	28	31	35
Compare prices at different supermarkets	23	26	18	21	26	30	18	24	23	21
Buy products on special even if you hadn't planned to	20	27	22	19	16	22	13	17	25	25
Buy store/lower-priced brands instead of national brands	19	24	20	17	17	18	12	19	19	24
Go to supermarkets other than your principal one for advertised specials	10	11	8	11	9	11	6	9	11	11
Shop at a discount or warehouse store for grocery items	6	8	7	6	5	3	3	5	6	9
Shop at warehouse club store like BJs, PACE, etc.	2	0	2	2	2	2	1	2	2	2

TABLE

▲15▲

HOW USE OF SPECIALS, COUPONS AND PRICE COMPARISONS VARIES, BY INCOME AND EDUCATION

Q: *How often do you (READ EACH ITEM)—pretty much every time you shop, fairly often, only occasionally, or never?*

		Income					Education	
	Total	Less than $15,000	$15,001–$25,000	$25,001–$35,000	$35,001–$50,000	Over $50,000	High School Or Less	Some Coll./ College Graduate
	%	%	%	%	%	%	%	%
Base	1,000	170	180	172	186	152	475	517
Pretty Much Every Time								
Shop at only one store	45	45	45	43	45	47	49	41
Look in newspaper for grocery specials	40	49	43	34	33	34	50	31
Use price-off coupons	36	35	38	36	36	34	39	34
Stock up when you find a bargain	28	28	31	30	21	32	33	23
Compare prices at different supermarkets	23	28	26	22	14	17	27	18
Buy products on special even if you hadn't planned to	20	22	26	18	16	20	25	16
Buy store/lower-priced brands instead of national brands	19	25	22	16	14	15	22	15
Go to supermarkets other than your principal one for advertised specials	10	11	11	11	7	7	11	8
Shop at a discount or warehouse store for grocery items	6	7	7	6	5	6	6	5
Shop at warehouse club store like BJs, PACE, etc.	2	2	2	2	1	3	2	2

Look in Newspaper for Grocery Specials

▲ Nonworking women (52 percent) check the newspaper more often than either working women or men (Table 13).

▲ Shoppers in the East and Midwest are more likely than Southerners or Westerners to do this (Table 13).

▲ Shoppers aged 65 or older are most likely to search for advertised specials (Table 14).

▲ This practice declines as income rises. Shoppers from households earning less than $15,000 are the most likely to look for grocery specials in the paper (Table 15).

▲ Education is also inversely related to seeking out newspaper specials. Those with less education are more likely to do this (Table 15).

Use Price-Off Coupons

▲ Women are more likely than men to use coupons (Table 13).

▲ Shoppers in the East and Midwest are most likely, while those in the West are more likely to use price-off coupons than those in the South (Table 13).

▲ One-person households infrequently use coupons, while the practice is more common in households with two or more people (Table 14).

Stock Up When You Find a Bargain

▲ Women do this more often than men (Table 13).

▲ Shoppers from one-person households are by far the least likely to stock up on bargains (Table 14).

▲ Shoppers without a college education stock up more often than the college-educated (Table 15).

Compare Prices at Different Supermarkets

▲ Women, particularly the nonworking, are more likely than men to go to a supermarket other than their principal one to compare prices (Table 13).

▲ Shoppers 65 years and older tend to do more comparison shopping (Table 14).

▲ Both the income and education levels are inversely related to comparison shopping (Table 15).

Buy Products on Special That Day Even if You Hadn't Planned To

▲ Women are more likely than men to make such impulse purchases (Table 13).

▲ Shoppers with a college education are less likely than others to buy products on special (Table 15).

Buy Store or Lower-Priced Brands Instead of National Brands

▲ Store-brand purchases decline as household income rises and are greatest among shoppers with household incomes of $15,000 or less (Table 15).

▲ Shoppers without a college education purchase store brands more frequently than others (Table 15).

Methods of Economizing

Majorities of shoppers now rely on five techniques to save money on their food bills:

- ▲ Buy fewer luxury or gourmet items (60 percent).
- ▲ Use more price-off coupons (59 percent).
- ▲ Do more with leftovers (59 percent).
- ▲ Buy fewer convenience foods (56 percent).
- ▲ Eat out less often (54 percent).

The reported reliance on price-off coupons is consistent with the finding that shoppers use this measure on pretty much every shopping trip (Tables 16 and 11). Buying fewer convenience foods is up five percentage points from 1992. The only saving method that shoppers do not use frequently is buying only what's on their list (27 percent).

Over the past two years, the number of shoppers who practice almost all of these behaviors is growing. The exception again is buying only what's on the list—fewer shoppers in 1992 and 1993 than in 1991 do this to save money.

These measures are not new to shoppers; majorities have been practicing all eight of the methods for some time (Table 16). One activity that appears to be on the increase is eating out less often—41 percent say they have just begun to do this recently.

TABLE
▲16▲
MONEY-SAVING BEHAVIOR, 1991–1993

Q: *I'm going to read you some things that people have told us they do to economize on their food bills. For each one, please tell me if this is something you currently do.*

Base: 1,000 shoppers

Q: *Is this something you've been doing for a few years and are continuing to do now to economize, or something that youve just begun to do recently?*

Base: Shoppers who currently use that method of economizing (Reduced Bases)

	Currently Do			Jan. 1993 Length of Time	
	Jan. 1991[1]	Jan 1992	**Jan. 1993**	Been Doing Awhile	Just Begun
	%	%	%	%	%
Buy fewer luxury or gourmet items	55	58	**60**	75	24
Make more use of price-off coupons	58	61	**59**	80	20
Do more with leftovers	56	60	**59**	87	13
Buy fewer convenience foods	46	51	**56**	74	25
Eat out less often	50	52	**54**	59	41
Do more meal planning	42	45	**46**	75	25
Buy in larger quantity	39	40	**43**	74	26
Buy only what's on your list	34	24	**27**	86	14

[1] 1991 split sample base = 504.

Significant demographic differences are evident in methods of economizing (Tables 11-15). Larger households, particularly those with children, more often look for ways to save money on groceries than smaller ones. Younger shoppers eat out less often and buy in bulk more often than older shoppers, and women are significantly more likely than men to economize. These and other differences are detailed in Table 17.

Make More Use of Price-Off Coupons

▲ Women are more likely than men to use coupons. This is consistent with the earlier finding that more women use price-off coupons pretty much every time they shop.

▲ Shoppers from larger households use these more than those from one-person households.

▲ Shoppers without a college education are more likely to use coupons than those with at least some college.

Do More With Leftovers

▲ Shoppers without a college education do more with leftovers than others.

Buy Fewer Luxury or Gourmet Items

▲ More women than men save by foregoing gourmet foods.

Eat Out Less Often

▲ More women than men shoppers say they eat out less often.

▲ Shoppers aged 18 to 24 are the most likely to save money in this manner.

▲ Shoppers with a high school education or less are more likely to practice this measure than are those with more education.

TABLE
▲17▲
HOW CONSUMERS ECONOMIZE

Q: *I'm going to read you some things that people have told us they do to economize on their food bills. For each one please tell me if this is something you currently do.*

	Base	More Use Price-off Coupons	Do More With Leftovers	Buy Fewer Gourmet Items	Eat Out Less Often	Fewer Conven. Foods	More Meal Planning	Buy Larger Quantity	Buy List Items Only
		%	%	%	%	%	%	%	%
Total	1,000	59	59	60	54	56	46	43	27
Gender									
Men	259	44	58	51	49	52	47	43	35
Women	741	64	59	63	55	57	46	44	24
Age									
18–24	66	67	61	52	65	59	49	56	18
25–39	356	59	55	61	54	59	52	51	26
40–49	205	61	57	66	60	51	45	47	29
50–64	216	55	63	56	44	57	38	36	28
65+	149	60	64	56	53	52	46	24	28
Education									
HS or less	475	62	63	62	58	60	49	42	24
Some coll./ college graduate	517	56	55	57	50	52	44	45	29
Size of Household									
One	149	48	61	58	51	52	28	28	32
Two	361	59	62	59	52	58	47	36	27
Three–Four	362	63	55	59	55	54	50	51	24
Five or more	118	59	56	66	58	60	57	64	28
Type of Household									
With children	438	62	55	62	56	56	51	55	24
No children	555	57	62	58	52	56	42	35	29

Buy Fewer Convenience Foods

▲ Women buy fewer convenience foods to economize than men.

▲ Shoppers with a high school education or less are most likely to economize at the expense of convenience.

Do More Meal Planning

▲ The extent to which shoppers plan meals increases with household size. This technique is most prevalent in households of two or more persons, compared with one-person households.

▲ Households with children plan more than those without.

Buy in Larger Quantity

▲ Quantity purchasing increases with household size: Shoppers from households of three or more are twice as likely as those from one-person households.

▲ Households with children more often buy large quantities than households without children.

▲ The frequency with which shoppers buy in larger quantities also declines with age: Shoppers under age 50 are more likely than those 50 or older.

Buy List Items Only

▲ More men than women buy only what's on their list to economize.

Who Are the Heavy Economizers?

Consumer concerns about the economy are evidenced by the fact more than one in five shoppers may be classified as a "heavy economizer" (21 percent)—defined as someone who practices five or more of the eight economizing measures outlined in Table 16.

Trends offers this profile of heavy economizers:

▲ Women (23 percent), especially the nonworking (25 percent).

▲ Married, from one-income households (25 percent).

▲ In households with children (24 percent).

▲ From larger households (26 percent are from households of five or more).

▲ From households with incomes under $25,000.

Heavy economizers spend an average of $77 per week on groceries—three dollars less than the national average (Tables 8 and 18). Per-person expenditures of $29 are somewhat below the $31 reported overall (Tables 10 and 18).

TABLE
▲18▲
PROFILE OF HEAVY ECONOMIZERS, 1991–1993

	1993 Base	Heavy Economizers[1]		
		1991[2]	1992	1993
		%	%	%
Total	426	18	21	21
Gender				
Men	87	17	16	16
Women	339	19	22	23
Working	174	18	22	22
Nonworking	163	21	22	25
Married				
One wage-earner	102	23	26	25
Two wage-earners	138	20	22	20
Type of Household				
With children	205	24	27	24
No children	217	15	15	19
Size of Household				
One	45	13	13	16
Two	152	16	17	21
Three-four	161	22	24	22
Five or more	61	26	30	26
Age				
18–24	33	26	33	22
25–39	164	20	24	23
40–49	95	18	21	23
50–64	73	16	19	17
65+	57	15	10	19
Income				
$15,000 or less	87	19	23	25
$15,001–$25,000	82	20	22	25
$25,001–$35,000	55	15	25	16
$35,001–$50,000	84	24	20	23
$50,000 or more	66	18	16	19
Region				
East	80	17	22	23
Midwest	126	19	18	22
South	122	21	22	21
West	98	14	22	20
Average Weekly Grocery Expenses				
Per family	401	$80	$81	$77
Per person	401	$29	$29	$27

[1]Included in the "heavy economizer" group are shoppers who currently practice five or more of the eight economizing measures summarized in Table 17.

[2]1991 split sample = 504.

CHAPTER ▲3▲

SHOPPING PATTERNS

SWITCHING STORES

The number of shoppers who switched stores in the past year remained at about one in four. For the second year, better or lower prices superseded a convenient store location as the primary reason for changing supermarkets (Tables 19, 20).

Since 1992, the proportion of shoppers who changed stores fell three points to 24 percent. This small decrease may be attributed to those earning $35,001 to $50,000 (Table 19). This group registered a significant decrease in store switching—from 31 percent in 1992 to 18 percent in 1993.

Who are the store-switchers in 1993? Among women, the working are more likely. Younger people are also more likely to switch.

When asked to give reasons for switching stores, the largest percentage cited cost savings, then convenient location (Table 20):

TABLE
▲19▲
SWITCHING STORES 1989–1993

Q: *During the past year, have you switched grocery stores?*

	Base	Jan. 1989 Yes	Jan. 1990 Yes	Jan. 1991 Yes	Jan. 1992 Yes	Jan. 1993 Switched Stores Yes	No	Not Sure
		%	%	%	%	%	%	%
Total	1,000	29	27	24	27	**24**	75	1
Gender								
Men	259	30	29	29	30	**27**	72	1
Women	741	29	27	22	27	**23**	76	1
Working	401	30	30	23	31	**28**	71	1
Nonworking	336	28	24	21	22	**18**	82	1
Age								
18–24	66	34	33	40	44	**47**	53	0
25–39	356	35	31	27	32	**28**	71	1
40–49	205	28	28	21	31	**26**	73	1
50–64	216	24	22	19	22	**14**	85	1
65 or older	149	21	23	22	13	**18**	81	1
Income								
$15,000 or less	170	31	30	23	28	**27**	71	2
$15,001–$25,000	180	26	28	26	26	**26**	72	2
$25,001–$35,000	172	39	27	23	23	**27**	73	1
$35,001–$50,000	186	32	28	24	31	**18**	82	1
$50,001 or more	152	27	26	25	32	**27**	73	0
Region								
East	179	31	24	26	30	**23**	77	1
Midwest	308	26	26	21	24	**21**	78	1
South	293	33	30	26	29	**25**	74	1
West	220	25	30	24	27	**29**	69	2

*Less than 0.5 percent.

▲ Better/lower prices (40 percent).

▲ Location/new store is closer/more conveniently located (31 percent).

Wider variety or a greater selection—a critical item in shoppers' evaluation of their principal supermarket—continues to drive much store switching (21 percent). This is also one of the major areas in which shoppers suggest improvements to their principal supermarket (Table 7). Better quality products/store is the only attribute that shows a significant increase (12 percent in 1993 vs. 4 percent in 1992).

One in 10 shoppers says they switch stores for better meats, because they moved to another area, or because the new store is cleaner. It should be noted that shoppers regard having a clean, neat store as one of the most critical items when evaluating a supermarket's performance (Table 1).

Taken together, convenient location (31 percent), moved to another area (10 percent) and store closings (4 percent) account for 45 percent of mentions. This issue of proximity is one in which most stores have little control.

Employee attitude and competence is one of the reasons mentioned by shoppers for switching stores (6 percent). It is an area of service quality that is known to have great impact on customer retention and customer satisfaction.

TABLE
▲20▲
REASONS FOR STORE SWITCHING, 1989–1993

Q: *For what reasons did you switch?*

Base: Those who switched grocery stores

	Jan. 1989 Total	Jan. 1990 Total	Jan. 1991 Total	Jan. 1992 Total	**Jan. 1993 Total**
Base	302	278	243	274	**243**
	%	%	%	%	**%**
Better/lower prices	37	40	44	39	**40**
Location/new store is closer/more conveniently located	41	50	44	31	**31**
More variety/selection	23	28	26	25	**21**
Better quality products/store	x	x	x	4	**12**
Better meats	10	11	7	8	**10**
Moved to another area	x	x	x	8	**10**
New store cleaner	x	x	x	7	**10**
Employee attitude and competence	x	x	x	8	**6**
Better produce	9	9	7	5	**4**
Store closed	x	x	x	3	**4**
Faster checkouts	x	x	x	x	**2**
Better service	x	x	x	x	**1**
Other	26	16	15	11	**14**
Not sure	1	1	0	1	**1**

Multiple responses accepted.
x = Not mentioned in previous years.

Visits to Supermarket in an Average Week

In 1993, shoppers once again averaged 2.2 trips to the grocery store each week (Table 21). This number is consistent with the average over the last 12 years, which has ranged from 2.0 to 2.4. Household size remained the factor that most clearly differentiates how often shoppers visit the supermarket. The frequency also varies slightly by sex and presence of children (Table 22):

- ▲ Men average more trips than women.
- ▲ Shoppers with children make more trips than others.
- ▲ Frequency increases with household size. Shoppers from households of five or more average nearly three trips per week.

TABLE
▲21▲

HOW OFTEN SHOPPERS GO TO THE SUPERMARKET IN AN AVERAGE WEEK, 1982–1993

Q: *About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different stores.*

Base: 2,006 shoppers

	Total											
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	Jan. 1991	Jan. 1992[1]	Jan. 1993[1]
	%	%	%	%	%	%	%	%	%	%	%	%
Number of Visits												
1	31	31	31	29	31	29	28	30	31	30	28	**31**
2	32	34	31	32	34	32	32	31	32	34	35	**33**
3	20	20	20	20	20	21	22	21	21	19	20	**20**
4	7	8	8	9	6	8	9	6	7	8	7	**6**
5	3	3	4	4	4	3	4	3	3	4	3	**3**
6 or more	3	3	3	4	2	4	3	5	3	4	3	**3**
Every 2 weeks	1	*	2	2	1	1	2	3	3	2	4	**3**
Average number of supermarket visits per week	2.3	2.3	2.3	2.3	2.0	2.4	2.3	2.3	2.2	2.3	2.2	**2.2**

[1]Based on 2,000 shoppers in 1992 and 2,006 shoppers in 1993.

*Less than 0.5 percent.

TABLE
▲22▲

HOW OFTEN SHOPPERS GO TO THE SUPERMARKET IN AN AVERAGE WEEK

Q: About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different stores.

	Jan. 1993 Base	One	Two	Three	Four	Five	Six +	Every Two Weeks	Average
		%	%	%	%	%	%	%	
Total	2,006	31	33	20	6	3	3	3	2.2
Gender									
Men	540	28	31	21	7	5	4	4	2.3
Women	1,466	32	33	20	6	3	2	3	2.1
Working	808	30	35	20	7	3	2	2	2.2
Nonworking	652	34	32	20	5	3	2	4	2.1
Type of Household									
With children	869	26	33	24	8	4	3	3	2.3
No children	1,125	34	33	18	5	3	3	3	2.1
Size of Household									
1	282	35	36	15	4	2	1	4	1.9
2	742	35	31	20	4	3	3	3	2.1
3–4	733	28	34	22	7	4	3	2	2.3
5 or more	234	22	29	26	13	3	4	3	2.5
Age									
18–24	147	33	31	19	6	3	1	7	2.0
25–39	702	29	35	20	8	3	2	3	2.2
40–49	421	27	32	25	5	5	3	2	2.3
50–64	423	32	33	19	5	4	4	3	2.2
65 and older	302	38	30	17	5	2	4	4	2.0

May not add to 100 percent due to rounding.

Supermarkets and Takeout Food

Fast-food restaurants continue to dominate as the primary source of takeout food. They are used by nearly half of all shoppers (46 percent), followed by restaurants (27 percent) (Table 23).

One out of seven shoppers purchases takeout from a supermarket (15 percent)—an increase after the slight decline noted in 1992. Use of supermarkets for takeout varies by marital status, household size, age and income (Table 24):

▲ Unmarried shoppers buy takeout food at the supermarket more often than married ones.

▲ Shoppers who live alone do so with greater frequency than those in larger households.

▲ Shoppers aged 65 or older take out from supermarkets twice as often as those aged 18 to 24.

▲ Shoppers with household incomes of $15,000 or less use supermarkets more often than those with incomes greater than $25,000.

TABLE
▲23▲
SOURCE OF TAKEOUT FOOD, 1986–1993

Q: *When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say most often from a fast-food restaurant, a restaurant, a supermarket, convenience store, or from some other place?*

	Jan. 1986 Total	Jan. 1987 Total	Jan. 1988 Total	Jan. 1989 Total	Jan. 1990 Total	Jan. 1991 Total	Jan. 1992 Total	**Jan. 1993 Total**
Base[2]	1,004	1,007	1,019	1,031	514	1,004	1,000	**1,006**
	%	%	%	%	%	%	%	%
Fast-food restaurant	43	44	41	41	46	51	55	**46**
From a restaurant	38	33	38	33	27	23	24	**27**
From a supermarket	10	9	11	12	14	14	12	**15**
From a convenience store	x	x	x	x	2	2	2	**2**
Some other place	2	7	3	6	2	1	*	**1**
It varies (volunteered)	1	1	1	3	4	5	3	**5**
Don't eat out	x	x	x	7	6	4	4	**4**
Not sure	3	3	4	1	*	1	1	**1**

x = Not asked.

*Less than 0.5 percent.

[1]In 1986–1989, question was worded, Would you say *most often* from a fast-food store, a carryout section of a restaurant, a carryout section of a supermarket, or from some other place?

[2]1990 split sample.

TABLE
▲24▲

USE OF SUPERMARKET AS SOURCE OF TAKEOUT FOOD

Q: *When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say most often from a fast-food restaurant, a restaurant, a supermarket, a convenience store, or from some other place?*

	Jan. 1993 Base	Use Supermarket For Takeout Food		
		1993	1992	1991
		%	%	%
Total	1,006	15	12	14
Gender				
Men	281	17	9	16
Female	725	14	13	13
Working	407	12	10	11
Nonworking	316	17	17	16
Marital Status				
Married	666	13	11	12
Not married	336	19	14	17
Size of Household				
1	133	22	17	20
2	381	15	16	11
3–4	371	11	8	13
5 or more	116	17	12	13
Age				
18–24	81	11	5	14
25–39	346	13	10	11
40–49	216	10	9	10
50–64	207	18	15	16
65 or older	153	24	23	26
Income				
$15,000 or less	184	19	19	19
$15,001–$25,000	154	15	11	15
$25,001–$35,000	167	10	15	15
$35,001–$50,000	184	14	7	9
$50,001 or more	201	14	10	8

CHAPTER ▲4▲

NEW PRODUCTS AND SERVICES

AVAILABILITY

Nearly all shoppers can find in the supermarket private label or store brands (90 percent) and delicatessen or other carryout food items (86 percent) (See Table 25). However, private label or store brands are reported to be less available than in the previous year (down five percentage points).

Two items are more widely available in 1993:

▲ Credit cards accepted for purchase (up eight points to 41 percent).

▲ Food catering (up six points to 55 percent).

More shoppers reported a full-service, in-store bank (20 percent) available than in 1990, the last time *Trends* inquired about this service.

TABLE
▲25▲

AVAILABILITY OF STORE PRODUCTS AND SERVICES, 1987–1993

Q: *Thinking about the supermarket where you do most of your shopping, does it carry or have (READ EACH ITEM)?*

	Jan. 1987 Yes	Jan. 1988 Yes	Jan. 1989 Yes	Jan. 1990 Yes	Jan. 1991[1] Yes	Jan. 1992[2] Yes	Jan. 1993[3] Yes	No	Not Sure
	%	%	%	%	%	%	%	%	%
Private label or store brands	x	x	x	93	94	95	**90**	6	3
Delicatessen or other carryout food items	78	80	82	80	87	87	**86**	13	1
Gourmet or specialty foods	72	74	66	56	70	73	**67**	28	5
Floral department	x	x	x	x	69	69	**67**	32	1
Unpackaged or bulk food	61	56	55	58	51	61	**65**	29	6
Food catering	41	45	47	49	47	49	**55**	35	10
Fresh, not frozen, pizza	52	47	53	51	52	57	**54**	38	9
Postage stamps	29	34	46	46	51	51	**54**	32	14
A salad bar	37	40	42	38	48	52	**52**	47	2
Videos or movies for rent, rather than for sale[4]	38	44	50	47	49	51	**48**	47	6
Videos or movies for sale, rather than for rent	x	x	x	x	x	40	**44**	42	15
Prescription drug counter	x	27	31	30	36	41	**42**	57	1
Credit cards accepted for purchase	x	x	x	x	x	33	**41**	33	27
Full-service, in-store bank[5]	x	x	17	15	x	x	**20**	76	4
Home delivery	x	x	x	x	8	14	**12**	72	16

x = Not asked.

[1]Split sample; bases = 500 and 504.

[2]Split sample; bases = 495 and 505.

[3]Split sample; bases = 499 and 507.

[4]In 1991 and earlier, shoppers were asked if their supermarket offered "video rentals."

[5]Base = 1,006 in 1993.

May not add up to 100 percent due to rounding.

According to shoppers, about two out of three supermarkets offer gourmet or specialty foods (67 percent), a floral department (67 percent) and unpackaged or bulk foods (65 percent). Although the availability of gourmet foods increased after 1990, that trend has now reversed (73 percent in 1992 vs. 67 percent in 1993). Three more offerings are available in at least half the stores:

▲ Fresh, not frozen, pizza (54 percent).

▲ Postage stamps (54 percent).

▲ A salad bar (52 percent).

Offered by at least two in five stores are videos or movies for rent (48 percent) and for sale (44 percent), a prescription drug counter (42 percent) and credit cards accepted for purchase (41 percent).

Using Store Products and Services

As part of their weekly shopping trip, the largest percentage of shoppers use three products and services:

▲ Private label or store brands (42 percent).

▲ Delicatessen or other carryout food items (24 percent).

▲ Unpackaged or bulk foods (23 percent).

With the exception of unpackaged or bulk foods, the most widely used items are also the most widely available. Private label or store brands continue to be the most frequently purchased items on a weekly basis. At least one in 10 respondents reports renting videos (14 percent), making salad bar purchases (10 percent)

TABLE
▲26▲
SHOPPERS' USE OF STORE PRODUCTS AND SERVICES

Q: *Thinking about the supermarket where you shop, how often do you use or purchase (READ EACH ITEM)?*

Base: Those who say their supermarkets have the product or service[1]

		Frequency of Use				
	Base	At Least Once A Week	1–3 Times A Month	Less Than Once A Month	Never	Not Sure
		%	%	%	%	%
Private label or store brands	451	42↓	38↑	10	6	4
Delicatessen or other carryout food items	436	24	35	27↑	13	*
Unpackaged or bulk food	325	23↓	37↑	19	21	1
Videos or movies for rent, rather than for sale	242	14	16	15	55	1
A salad bar	262	10↓	20	24↑	45	*
Full-service, in-store bank	201	10	10	10	68	2
Gourmet or specialty foods	341	8	39	34	19	1
Credit cards accepted for purchase	203	7	8	12↑	72↑	1
Postage stamps	275	6	31	19	43	*
Fresh, not frozen, pizza	269	4	24	35	38	0
Videos or movies for sale, rather than for rent	217	4	7	20	68	2
Floral department	338	2	14	47	36	1
Food catering	274	2	3	23	72	1
Prescription drug counter	211	0	20	21	58	1
Home delivery	59	0	2	9	88	2

↑ = Significant increase from 1992.
↓ = Significant decrease from 1992.
x = Not asked.
*Less than 0.5 percent.
[1]Split sample; bases = 499 and 507
May not add up 100 percent due to rounding.

and using a full-service, in-store bank (10 percent) at least once a week.

Shoppers were asked to quantify their use (e.g., at least once a week, one-three times a month, etc.) rather than reporting it on a scale ranging from "frequently" to "never" (see Table 26), as was done in the past. Owing to this methodological change, trend data on use are not comparable and are not reported for 1992 and earlier. Arrows are used on Tables 26 and 27 to indicate significant increases or decreases in use over the last year.

Potential Use of New Products and Services

Although their supermarkets do not carry a particular item, shoppers say they would use the following items at least once a week if made available (Table 27):

- ▲ Private label or store brands (22 percent).
- ▲ Video rentals (18 percent).
- ▲ Full-service, in-store bank (17 percent).
- ▲ Delicatessen or other carryout food items (15 percent).
- ▲ Unpackaged or bulk food (15 percent).

TABLE
▲27▲
POTENTIAL USE OF NEW PRODUCTS AND SERVICES

Q: *If your supermarket carried or had (READ EACH ITEM), how often do you think you would use or purchase it?*

Base: Those who say their supermarkets have the product or service[1]

		Potential Frequency of Use				
	Base	At Least Once A Week	1-3 Times A Month	Less Than Once A Month	Never	Not Sure
		%	%	%	%	%
Private label or store brands	32	22↓	34	0	22	22
Videos or movies for rent, rather than for sale	236	18	17	14↑	50	1
Full-service, in-store bank	767	17	18	6	54	6
Delicatessen or other carryout food items	68	15↓	35↑	18	29	3
Unpackaged or bulk food	145	15	8	27	9	42
A salad bar	237	12↓	22	20	44	3
Gourmet or specialty foods	140	11	27	28	30	4
Postage stamps	160	9	24	15	49	3
Home delivery	359	9	10	8	69	3
Fresh, not frozen, pizza	187	8↓	26	25↑	39	3
Credit cards accepted for purchase	164	5	9	8	77	1
Prescription drug counter	290	3	18	21	53	5
Video movies for sale, rather than for rent	208	3	12	16	66	3
Food catering	173	3	7	24	63	3
Floral department	164	1	17	29	52	1

↑= Significant increase from 1992.
↓= Significant decrease from 1992.
x = Not asked.
*Less than 0.5 percent.
[1]Split sample; bases = 499 and 507.
May not add up to 100 percent due to rounding.

CHAPTER 5

CONSUMER ACTIVISM AND THE ENVIRONMENT

GENERAL CONSUMER ACTIVISM

Consumer activism remained high in 1993, although some behaviors were down slightly from 1992. As before, refusing to buy products that cost too much is the primary action that shoppers have taken. Nine out of 10 shoppers say they have done so (89 percent, down one point from 1992)—30 percent more than the proportion who have taken any other single action (Table 28).

Less widely practiced actions have socially motivated, not economic, roots. A new category—seeking out products with recyclable packaging—took over the second spot with 59 percent of shoppers reporting this action. A majority of shoppers also refuses to purchase a product because they disagree with the manufacturer's policies (53 percent, unchanged from 1992). About four in 10 refuse to buy products associated with unethical treatment of animals (42 percent) or because of unnecessary or unrecyclable packaging (39 percent). Fewer than one in five have joined an organized consumer boycott (15 percent).

Participation in *all* consumer activities continues to climb above levels reported in 1991 *and* the early 1980s (Table 29). Differences between shoppers in the 1990s and 1980s may reflect real behavioral changes. Caution must be exercised in comparing these findings since question wording varies from decade to decade.

TABLE 28

ACTIONS CONSUMERS HAVE TAKEN

Q: *First, I'd like to know if you personally have already done any of the following.*

Base: 1,006 shoppers

	Have Already Done					January 1993		
	Jan. 1982	Jan. 1983	Jan. 1984*	Jan. 1991	Jan. 1992	Yes	No	Don't Know
	%	%	%	%	%	%	%	%
Refuse to buy products that cost too much	77	70	72	84	90	**89**	10	1
Seek out products with recyclable packaging	x	x	x	x	x	**59**	40	1
Refuse to buy products manufactured by companies whose policies you do not agree with	x	x	x	47	53	**53**	42	5
Refuse to buy products where ethical treatment of animals may be called into question	x	x	x	38	46	**42**	51	7
Refuse to buy products because of unrecyclable or unnecessary packaging	x	x	x	30	38	**39**	59	2
Join an organized consumer boycott against particular products or stores	8	7	9	13	16	**15**	83	1

x = Not asked.

Numbers may not add to 100 percent owing to rounding.

*In 1984 and earlier, respondents were asked: "Is this something you already have done, something you are ready to do, something you can sympathize with but wouldn't do, or something you think is ineffective, wrong or illegal?" Percentages shown are the sum of those who answered "already have done" or "ready to do".

Willingness to participate in consumer activism is at a new high for most items. Shoppers who have not already participated in a particular activity were further asked their future willingness to do so. When combining this number with those who say they would be "very likely" to participate in the specified activity, consumer activism increases significantly for all items. Shoppers in 1993 are more likely than those in 1991 to express a propensity for all actions (see Table 29). For the second year, the number of shoppers who are willing to boycott a product or store increased (29 percent in 1993 vs. 25 percent in 1992).

TABLE
▲29▲
ACTIONS CONSUMERS HAVE DONE OR ARE LIKELY TO DO

Q: *First, I'd like to know if you personally have already done any of the following.*

Q: *How likely would you be to (READ EACH ITEM)? Please use a 5-point scale where "1" means not at all likely and "5" means "very likely":*

Base: 1,006 shoppers

	Have Already Done or Are Very Likely to Do					
	Jan. 1982	Jan. 1983	Jan. 1984*	Jan. 1991	Jan. 1992	Jan. 1993
	%	%	%	%	%	%
Refuse to buy products that cost too much	85	77	79	87	93	**92**
Seek out products with recyclable packaging	x	x	x	x	x	**66**
Refuse to buy products manufactured by companies whose policies you do not agree with	x	x	x	57	62	**65**
Refuse to buy products where ethical treatment of animals may be called into question	x	x	x	48	56	**57**
Refuse to buy products because of unrecyclable or unnecessary packaging	x	x	x	38	46	**53**
Join an organized consumer boycott against particular products or stores	27	23	25	21	25	**29**

x = Not asked.

*In 1984 and earlier, respondents were asked: "Is this something you already have done, something you are ready to do, something you can sympathize with but wouldn't do, or something you think is ineffective, wrong or illegal?" Percentages shown are the sum of those who answered "already have done or ready to do."

Responsibility for Ensuring That Products Are Environmentally Safe

Shoppers rely most on manufacturers or food processors (35 percent) and government agencies or institutions (27 percent) to ensure that the food and nonfood products they buy in their supermarket are environmentally safe and friendly. This is nearly three times the percentage who depend on any other single source. Another one in 10 shoppers feel that responsibility lies with food stores and slightly fewer rely on everyone equally, including themselves and consumer organizations (Table 30).

In the past year, responsibility moved back toward manufacturers after declining in 1992. More shoppers now see this sector as the focus for responsibility, rather than government institutions or food stores. Shoppers also report a greater reliance on themselves (up one point to 8 percent).

TABLE
▲30▲

PRIMARY RESPONSIBILITY FOR ENSURING THAT PRODUCTS ARE ENVIRONMENTALLY SAFE

Q: *Who do you feel should be primarily responsible for ensuring that the food and nonfood products you buy in your supermarket are environmentally safe and friendly?*

	Jan. 1991 Total	Jan. 1992 Total	Jan. 1993 Total
Base	1,004	1,000	1,006
	%	%	%
Manufacturers/food processors	37	33	35
Government institutions or agencies	24	29	27
Food stores	9	12	10
All are responsible	3	8	8
Yourself as an individual	12	7	8
Consumer groups/organizations	9	6	7
Farmers	2	2	2
No one	1	0	*
Other	0	*	0
Not sure	4	3	4

*Less than 0.5 percent.

CHAPTER 6

NUTRITION

EVALUATION OF DIET

Shoppers continue to see substantial room for improvement in their diets (Table 31). Two out of three think their diet could be healthier (67 percent). Only one in 10 believes that their diet is as healthy as it could possibly be—although another 22 percent say it is healthy enough.

Certain demographic groups are more likely to say that their diet could be healthier:

- ▲ Working women.
- ▲ Shoppers from households with children.
- ▲ Shoppers under age 65.

Three groups show significant changes from the 1992 *Trends* survey. Men dropped six percentage points in reporting that their diet could be healthier, and those from households earning $25,001 to $35,000 dropped seven points. Shoppers from

TABLE ▲31▲

EVALUATION OF DIET, 1990–1993

Q: *Thinking of all the foods you eat at home and away from home, how would you describe your diet? Would you say that it could be a lot healthier, could be somewhat healthier, is healthy enough, or is as healthy as it could possibly be?*

Base: 1,006 shoppers

	Could Be Somewhat Or a Lot Healthier				Jan. 1993				
	Jan. 1990	Jan. 1991	Jan. 1992	**Jan. 1993**	Could Be a Lot Healthier	Could Be Somewhat Healthier	Is Healthy Enough	Is as Healthy as It Could Possibly Be	Not Sure
	%	%	%	%	%	%	%	%	%
Total	65	69	66	**67**	13	54	22	10	1
Gender									
Men	63	71	66	**60**	11	49	28	11	1
Women	65	68	66	**69**	13	56	20	10	1
Working	72	71	72	**74**	16	59	19	6	*
Nonworking	57	63	61	**62**	11	52	22	15	2
Type of Household									
With children	70	73	70	**72**	15	57	20	8	1
No children	59	65	63	**63**	11	52	24	12	1
Age									
18–24	77	79	69	**70**	14	57	22	7	0
25–39	70	76	72	**76**	14	62	19	5	0
40–49	71	70	75	**72**	19	53	19	9	1
50–64	58	66	64	**60**	11	50	24	14	2
65 or older	45	51	42	**45**	5	40	33	20	2
Income									
$15,000 or less	64	61	55	**66**	17	49	21	11	2
$15,001–$25,000	65	70	65	**63**	16	47	25	11	1
$25,001–$35,000	69	75	72	**65**	11	55	28	7	0
$35,001–$50,000	58	74	69	**71**	11	60	19	10	0
$50,001 or more	69	72	74	**72**	11	61	20	8	0

*Less than 0.5 percent.

households with incomes of $15,000 or less moved 11 points in the other direction, saying their diet could be healthier.

At least nine out of 10 shoppers have changed their eating habits to ensure a healthful diet (Table 32).

For at least the last five years, eating more fruits and vegetables has been the primary way that shoppers ensure themselves of a healthful diet (62 percent in 1993). This behavior is reported more than twice as often as any other. Three out of 10 shoppers either eat

TABLE ▲32▲

DIETARY BEHAVIOR, 1989–1993

Q: *What, if anything, are you eating more or less of to ensure that your diet is healthy? (Verbatim responses coded to categories below; multiple responses accepted.)*

	Jan. 1989 Total	Jan. 1990 Total	Jan. 1991 Total	Jan. 1992 Total	Jan. 1993 Total
Base	1,031	1,005	1,004	1,000	1,006
	%	%	%	%	%
Those Giving a Dietary Change	92	90	91	93	92
More fruits/vegetables	59	57	57	60	62
Less meat/red meat	33	34	34	31	30
Less fats/oils	22	27	25	28	26
Less sugar	20	19	19	12	15
Eating more chicken/turkey/white meat	16	19	16	14	14
Less snack foods	x	x	4	12	12
Eating more fish	18	18	14	10	10
More fiber	13	16	16	8	8
Less salt	13	15	10	8	8
Less cholesterol	12	15	12	8	6
Less fried foods	10	14	7	7	6
More starch/rice/potato/pasta	x	x	3	5	5
Less dairy/butter/cheese/whole milk	x	x	4	7	4
More balanced diet/wider variety	3	5	3	4	4
More fresh foods	8	6	7	3	3
More whole grain	x	x	x	2	3
Fewer calories	5	5	4	3	2
More protein	5	4	3	2	2
Less prepared/processed foods	x	x	x	x	2
More dairy products	x	x	x	2	2
More juices	x	x	x	2	2
More vitamin/mineral supplements	2	1	2	2	1
More beef/better cuts of meat	x	x	x	2	1
More organically grown/natural foods	2	2	2	1	1
Less starches/pasta/ beans/rice	x	x	x	x	1
More foods high in vitamins/ minerals	2	1	1	1	1
More water/bottled water	x	x	x	x	1
More low-fat/skim milk	x	x	x	1	1
Less food with chemicals/preservatives/ additives	x	x	x	x	1
Less pork	x	x	x	x	1
Other	20	11	9	12	6
Nothing	5	7	6	4	4
Not sure	3	3	3	3	4

x = Not reported as a category in that year.
Multiple responses accepted.

less meat or less red meat (30 percent) or consume less fats and oils (26 percent). The only other behaviors mentioned by at least one in 10 were cutting down on sugar (15 percent), eating more chicken/turkey/white meat (14 percent), eating less snack foods (12 percent) and eating more fish (10 percent).

Concern over dietary sources of cholesterol appears to be dropping. Fewer 1993 than 1992 shoppers say they eat:

▲ Less cholesterol (down two points to 6 percent).

▲ Less fried food (down one point to 6 percent).

▲ Less dairy, butter, cheese or whole milk (down three points to 4 percent).

All other categories are essentially unchanged from 1992.

Factors for Food Selection

Taste is, by far, the most important consideration when selecting food. Nine out of 10 shoppers consider taste very important. It outweighs nutrition (75 percent), price (74 percent) and product safety (72 percent). Four other factors are at least somewhat important to the majority of shoppers (Table 33).

In the past five years, price increased in importance (up nine percentage points since 1988), while product safety and storability each decreased by about the same amount. Since last year, recyclable packaging and food preparation time each declined about five points.

TABLE
▲33▲

IMPORTANCE OF VARIOUS FACTORS IN FOOD SELECTION, 1989–1993

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important, or not at all important to you when you shop for food.*

Base: 1,000 shoppers

	Very Important					Jan. 1993				
	Jan. 1988	Jan. 1989	Jan. 1990	Jan. 1991	Jan. 1992	**Very Important**	Somewhat Important	Not Too Important	Not at All Important	Not Sure
	%	%	%	%	%	%	%	%	%	%
Taste	88	87	88	90	89	**91**	7	1	1	1
Nutrition	72	76	75	75	77	**75**	22	3	1	*
Price	65	64	66	71	75	**74**	22	3	1	*
Product safety	83	74	71	72	71	**72**	19	5	2	3
Storability	53	40	43	43	46	**45**	37	14	3	2
Product packaging that can be recycled	x	x	x	48	45	**41**	37	16	5	1
Ease of preparation	39	36	33	34	36	**37**	42	16	4	1
Food preparation time	x	37	36	38	41	**36**	39	18	6	1

x = Not asked.

*Less than 0.5 percent.

May not add to 100 percent due to rounding.

Nutrition continues to be very important to two out of three shoppers. The importance of nutrition in food selection differs among shopper subgroups (Table 34). More women consider nutrition very important than men (83 vs. 53 percent). The important of nutrition increases with age. Shoppers with family members on a medically restricted diet are also more likely to consider nutrition very important than other shoppers (90 vs. 72 percent).

TABLE
▲34▲
IMPORTANCE OF NUTRITION IN FOOD SELECTION

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important, or not at all important to you when you shop for food. How important is nutrition?*

	Jan. 1993 Base	Jan. 1993 Very Important	Somewhat Important	Not Too Important	Not at All Important	Not Sure
		%	%	%	%	%
Total	1,000	75	22	3	1	*
Gender						
Men	259	53	39	5	2	1
Women	741	83	15	2	*	*
Working	401	80	19	2	*	0
Nonworking	336	86	11	2	1	*
Age						
18–24	66	59	35	5	2	0
25–39	356	69	27	3	*	0
40–49	205	77	19	2	2	1
50–64	216	83	16	1	0	1
65 or older	149	81	15	2	1	1
Type of Household						
With children	438	74	22	3	1	*
No children	555	75	21	3	1	*
Medically Restricted Diet						
Yes	181	90	10	1	0	0
No	813	72	24	3	1	*

*Less than 0.5 percent.

Nutritional Content

Although 75 percent say nutrition is very important in purchasing food products, only 54 percent are very concerned about the nutritional content of the food they eat (Table 35). The proportion who are "very" concerned about nutritional content dropped 10 points in 1993 to 54 percent. Nearly all shoppers remain at least somewhat concerned with nutritional content (94 percent).

The proportions who are "very" concerned about the nutritional content of food vary by demographic subgroups:

▲ Women, and especially the nonworking, are more likely to be very concerned.

▲ Households with no children under 18 are more likely than those with children.

▲ The proportion increases with age and with level of education.

▲ Fewer Midwestern shoppers are very concerned about nutritional content than those elsewhere.

TABLE
▲35▲
SHOPPER CONCERN ABOUT NUTRITIONAL CONTENT, 1986–1993

Q: *Would you say you and your family are very concerned, somewhat concerned, not very concerned, or not at all concerned about the nutritional content of the food you eat?*

Base: 1,006 shoppers

	Very Concerned							Level of Concern, **1993**			
	1986	1987	1988	1989	1990	1991	1992	**Very**	Some-what	Not Very/ Not at All	Not Sure
	%	%	%	%	%	%	%	**%**	%	%	%
Total	58	54	56	55	55	56	64	**54**	40	6	*
Gender											
Men	55	48	48	51	50	49	55	**50**	43	7	*
Women	58	55	58	57	56	59	67	**56**	39	5	*
Working	54	49	53	51	51	58	65	**53**	43	5	0
Nonworking	62	62	64	63	64	60	69	**60**	34	6	*
Type of Household											
With children	57	52	52	53	52	51	62	**49**	44	5	0
No children	58	55	59	57	58	60	66	**58**	37	5	*
Age											
18–24	55	41	33	41	41	44	47	**37**	54	9	0
25–39	54	47	51	51	48	51	59	**45**	50	5	0
40–49	49	54	52	57	52	51	63	**56**	38	6	0
50–64	68	60	66	65	62	67	72	**67**	29	4	0
65 and older	65	69	72	63	74	65	75	**64**	26	9	1
Region											
East	58	58	54	53	56	53	69	**57**	39	5	0
Midwest	53	49	52	53	47	55	58	**41**	50	8	*
South	59	56	60	56	61	58	66	**58**	36	6	0
West	62	53	56	61	56	60	64	**61**	35	4	*

* = Less than 0.5 percent.

▲ Shoppers who live with someone on a restricted diet are more likely to be very concerned (Table 36).

▲ Shoppers who are satisfied with the healthfulness of their diet express stronger nutritional concerns than those who think their diets could be healthier.

▲ Shoppers with a physical disability are more concerned than others.

While the overall level of concern about nutrition decreased dramatically over the past year, specific areas of concern are on the rise. Table 37 shows the percentage who volunteered their concerns in an open-ended question. Concern about fat content is now at an historical high (up four points from 1992 to 54 percent) and double what it was as recently as 1988. Salt content (up five points to 26 percent) has supplanted cholesterol levels (down seven points to 23 percent) as the next most frequently mentioned concern.

Of concern to at least one in 10 shoppers are salt content (26 percent), sugar content (18 percent), calories/low calories (15 percent), food/nutritional value (10 percent) and vitamin/mineral content (10 percent).

TABLE
▲36▲
SHOPPER CONCERN ABOUT NUTRITIONAL CONTENT, 1990–1993

Q: *Would you say you and your family are very concerned, somewhat concerned, not very concerned, or not at all concerned about the nutritional content of the food you eat?*

Base: 1,006 shoppers

	Very Concerned			Level of Concern, **1993**			
	Jan. 1990	Jan. 1991	Jan. 1992	**Very**	Somewhat	Not Very/ Not at All	Not Sure
	%	%	%	%	%	%	%
Total	55	56	64	**54**	40	6	*
Education							
High school or less	56	53	60	**48**	43	9	*
Some college/college graduate	54	60	68	**59**	38	3	*
Medically Restricted Diet							
Yes	70	69	81	**69**	25	6	1
No	51	53	59	**51**	44	6	*
Description of Diet							
Healthy enough	66	70	73	**65**	28	7	*
Could be healthier	49	50	60	**49**	46	5	0
Physical Disability							
Yes	x	x	x	**68**	24	7	1
No	x	x	x	**53**	42	6	*

* = Less than 0.5 percent.

x = Not asked.

May not add to 100 percent due to rounding.

TABLE

▲37▲

NATURE OF CONCERN ABOUT NUTRITIONAL CONTENT, 1985–1993

Q: *What is it about the nutritional content of what you eat that concerns you and your family most? (Verbatim responses coded to categories listed below; multiple answers accepted.)*

Base: 946 shoppers who are very or somewhat concerned about nutritional content of the food they eat

	1985 Total	1986 Total	1987 Total	1988 Total	1989 Total	1990 Total	1991 Total	1992 Total	**1993 Total**	1992–1993 Percentage Point Change
	%	%	%	%	%	%	%	%	%	
Fat content, low fat	13	17	16	27	29	46	42	50	**54**	+4
Salt content, less salt	19	20	22	26	25	30	22	21	**26**	+5
Cholesterol levels	10	13	14	22	38	44	37	30	**23**	-7
Sugar content, less sugar	20	18	16	20	15	16	12	13	**18**	+5
Calories, low calories	9	11	14	14	15	19	12	9	**15**	+6
Food/nutritional value	14	11	13	14	8	6	8	5	**10**	+5
Vitamin/mineral content	17	22	21	21	21	14	15	8	**10**	+2
Preservatives	13	15	14	16	9	7	8	11	**8**	-3
Chemical additives	18	16	10	12	7	4	8	9	**6**	-3
Ingredients/content	0	0	0	8	4	4	6	5	**5**	0
Desire to be healthy/eat what's good for us	3	6	7	7	6	3	8	2	**5**	+3
Making sure we get a balanced diet	11	14	14	11	10	4	5	4	**4**	0
Freshness, purity, no spoilage	8	8	8	15	6	4	4	5	**3**	-2
No harmful ingredients, nothing that causes illness/cancer	5	5	0	0	2	2	2	2	**3**	+1
Fiber content	2	3	4	5	5	5	3	2	**3**	+1
Chemicals	0	0	0	4	3	3	4	4	**2**	-2
Carbohydrate content	2	2	2	3	2	1	2	2	**2**	0
Empty calories, junk food	5	2	7	6	2	*	2	2	**2**	0
Artificial sweetener	2	1	*	0	1	1	1	1	**2**	+1
Protein value	4	5	4	6	4	2	4	2	**2**	0
As natural as possible, not overly processed	5	3	0	4	3	2	3	2	**2**	0
Processed foods	0	0	0	3	1	1	1	3	**1**	-2
Less red meat	2	2	0	0	3	2	1	2	**1**	-1
Quality of food	1	1	0	0	3	2	3	2	**1**	-1
Excess food coloring, dyes	3	2	3	0	1	*	1	1	**1**	0
Not sure/refused	6	5	7	2	7	6	9	8	**7**	-1

*Less than 0.5 percent.

Multiple responses accepted.

Shoppers' perceptions of the extent to which certain nutritional items constitute health hazards reflect their nutritional concerns (Table 38). Fats (57 percent) and cholesterol (51 percent) are viewed as serious hazards by the majority of shoppers. The number of shoppers who consider salt and sugar hazardous falls well below that for fats and cholesterol. Only one-third say salt is harmful, and half as many again say sugar is a serious hazard.

The 1993 survey asked how often shoppers read food labels for ingredient and nutrition information. One out of two shoppers always reads labels for ingredients when making the first purchase of an item (Table 39). On subsequent purchases only one-third will con-

TABLE
▲38▲

CONSUMER CONCERN ABOUT SELECTED NUTRITIONAL ATTRIBUTES, 1986–1993

Q: *I'm going to read a list of food items that may or may not constitute a health hazard. For each one, please tell me if you believe it is a serious health hazard, somewhat of a hazard, or not a hazard at all.*

Base: 1,006 shoppers

	Serious Hazard							1993			
	1986	1987[1]	1988[2]	1989	1990	1991	1992	**Serious Hazard**	Something of a Hazard	Not a Hazard At All	Not Sure
	%	%	%	%	%	%	%	%	%	%	%
Fats	44	55	61	58	54	62	58	**57**	38	4	1
Cholesterol	48	51	59	61	47	58	52	**51**	42	6	2
Salt in food	40	43	42	44	34	32	30	**33**	54	11	2
Sugar in food	29	28	28	23	17	18	17	**16**	56	26	2

[1]Split sample; bases = 498 and 509.

[2]Split sample; bases = 508 and 511.

May not add to 100 percent due to rounding.

TABLE
▲39▲

SHOPPER FREQUENCY OF READING FOOD LABELS FOR INFORMATION ON NUTRITION AND INGREDIENTS

Q: *When you buy a packaged food product for the first time, how often do you read the label for information on nutrition and ingredients? Would you say always, sometimes, rarely, or never?*

Q: *For all other times you buy packaged food products, how often do you read the label for information on ingredients and nutrition? Would you say always, sometimes, rarely, or never?*

Base: 1,006 shoppers

	Always	Sometimes	Rarely	Never	Don't Know
	%	%	%	%	%
Ingredients					
First purchase	50	35	10	5	*
Subsequent purchases	32	44	14	9	*
Nutrition					
First purchase	47	31	9	6	*
Subsequent purchases	32	38	14	9	*

* = Less than 0.5 percent.

tinue to read the label. Nearly as many (47 percent) always read the food label for nutritional content on the first purchase. This rate also falls to less than one-third of shoppers (32 percent) on any subsequent purchase.

Fat content is the single most sought information when reading a food label, cited by 59 percent (Table 40). About one-third of shoppers mention calorie content and sodium content, and one out of five read for general ingredients, nutritional content, sugar content, cholesterol level and preservatives or artificial ingredients. Only 3 percent volunteer expiration dates/freshness, although 95 percent of shoppers say *Use-by/best-if-used-by dates* are very important (see Table 1).

Overall, shoppers are more likely to look for nutritional information on a label than for non-nutritional information.

TABLE
▲40▲
INFORMATION SOUGHT BY CONSUMERS ON PRODUCT LABELS

Q: *Thinking of all the different products you buy, what specific information do you look for first when you read these labels? (Verbatim responses coded to categories listed below.)*

Q: *What other information do you specifically look for?*

Base: Those who read food labels always or sometimes for information on ingredients or nutrition

	Information Looked For First	Other Information Looked For	Total Mentions
Base	913	869	913
	%	%	%
Fat content	31	30	59
Ingredients	12	11	22
Calorie content	11	21	32
Sodium content	9	22	31
Nutritional content	8	14	21
Sugar content	7	15	21
Cholesterol level	6	17	22
Artificial ingredients/preservatives	5	14	19
Expiration dates/freshness	1	2	3
Price	1	2	4
Brand name/manufacturer/where it was made	1	2	3
Vitamins and minerals	*	3	3
Weight/size/amount	*	1	1
Chemicals/chemical additives	*	1	2
Number of servings	*	1	1
Carbohydrate content	0	1	1
Other	1	4	5
Nothing	1	8	1
Don't know	4	5	4

* = Less than 0.5 percent.

Responsibility for Food Being Nutritious

Shoppers continue to assume primary responsibility themselves for ensuring that the products they buy are nutritious (42 percent). Maintaining a trend first noted in 1990, shoppers are placing less responsibility on the public sector and more with private industry (Table 41).

Nearly twice as many now feel that manufacturers (25 percent), rather than government agencies or institutions (13 percent), should take responsibility.

Fewer than one in 10 shoppers feels that product nutrition is the responsibility of food stores, consumer organizations, farmers, or everyone equally.

TABLE
▲41▲

THOSE ON WHOM SHOPPERS RELY TO ENSURE THAT THE PRODUCTS THEY BUY ARE NUTRITIOUS, 1989–1993

Q: *Who do you feel should be primarily responsible for ensuring that the food you buy from the supermarket is nutritious: the federal government, the state government, consumer organizations, manufacturers, retailers, or yourself as an individual?*

	Jan. 1989 Total	Jan. 1990 Total	Jan. 1991 Total	Jan. 1992 Total	Jan. 1993 Total
Base	1,031	1,005	1,004	1,000	1,006
	%	%	%	%	%
Yourself as an individual	29	36	38	39	42
Manufacturers	29	21	26	27	25
Government institutions or agencies	28	23	17	14	13
Consumer organizations	6	7	6	4	7
All/everybody	x	x	3	6	6
Food stores[1]	4	6	6	7	4
Farmers	x	x	x	2	1
Other (Volunteered)	1	4	*	0	*
None (Volunteered)	*	1	*	1	*
Not sure	4	3	3	1	2

x = Not mentioned.

*Less than 0.5 percent.

[1]Called retailers in earlier years.

CHAPTER ▲7▲

FOOD SAFETY

IMPORTANCE OF SAFETY IN FOOD SELECTION

Product safety continues to be an important consideration when shopping for food. More than nine in 10 shoppers rate safety as at least somewhat important, and more than seven in 10 regard it as very important (Table 42). Certain subgroups continue to place greater emphasis on product safety: women, the high school-educated, consumers who buy food for a household member on a medically restricted diet and shoppers who are physically disabled. Concern over safety increases with age.

TABLE ▲42▲

IMPORTANCE OF PRODUCT SAFETY IN FOOD SELECTION, 1990–1993

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important, or not at all important to you when you shop for food. How important is product safety?*

		Jan. 1990	Jan. 1991	Jan. 1992	Jan. 1993				
	Base	Very Important	Very Important	Very Important	**Very Important**	Somewhat Important	Not Too Important	Not at All Important	Not Sure
		%	%	%	%	%	%	%	%
Total	1,000	71	72	71	**72**	19	5	2	3
Gender									
Men	259	64	62	56	**61**	27	7	2	2
Women	741	73	76	75	**76**	16	4	2	3
Working	401	66	72	73	**73**	19	4	2	3
Nonworking	336	80	81	78	**80**	12	4	1	4
Type of Household									
With children	438	73	78	72	**73**	20	4	1	2
No children	555	69	69	71	**71**	18	5	2	4
Age									
18–24	66	64	64	71	**50**	32	6	8	5
25–39	356	69	70	66	**71**	21	5	1	2
40–49	205	70	75	74	**70**	20	4	2	3
50–64	216	75	76	75	**77**	16	4	1	2
65 or older	146	76	74	77	**79**	11	4	1	4
Education									
High school or less	475	74	78	76	**76**	16	3	1	3
Some college or more	517	67	67	67	**69**	21	5	2	3
Medically Restricted Diet									
Yes	181	73	77	84	**77**	17	3	1	3
No	813	70	71	69	**71**	19	5	2	3
Physical Disability									
Yes	116	x	x	x	**79**	14	3	2	2
No	875	x	x	x	**71**	20	5	2	3

*Less than 0.5 percent

Confidence in Food Safety

Consumer confidence in the food supply did not change significantly in the past year: 73 percent of shoppers are completely or mostly confident that the food in their supermarket is safe (Table 43), the same proportion as 1992. This percentage remains nine points below the peak of 82 percent in 1991. Almost one in four (23 percent) now harbors some doubts about food safety. Confidence remains lower than the historic high in 1991 among all demographic segments.

TABLE
▲43▲
CONSUMER CONFIDENCE IN FOOD SAFETY, 1990–1993

Q: *How confident are you that the food in your supermarket is safe? Would you say you are completely confident, mostly confident, somewhat doubtful, or very doubtful?*

		Completely or Mostly Confident				Jan. 1993				
	Base	Jan. 1990	Jan. 1991	Jan. 1992	**Jan. 1993**	Completely Confident	Mostly Confident	Somewhat Doubtful	Very Doubtful	Not Sure
		%	%	%	**%**	%	%	%	%	%
Total	1,006	79	82	72	**73**	13	60	23	4	1
Gender										
Men	281	82	85	74	**75**	16	59	20	5	1
Women	725	79	81	71	**72**	12	60	25	3	*
Working	407	80	80	70	**72**	11	61	26	3	0
Nonworking	316	78	83	72	**71**	13	59	23	5	1
Age										
18–24	81	90	81	69	**77**	15	62	21	3	0
25–39	346	81	84	75	**73**	11	62	23	4	*
40–49	216	78	81	66	**70**	9	61	24	6	0
50–64	207	78	80	66	**69**	13	56	27	3	1
65 or older	153	74	89	79	**79**	20	59	17	3	1
Region										
East	177	76	80	68	**68**	13	55	27	4	1
Midwest	258	82	84	75	**80**	16	64	17	3	*
South	299	78	83	72	**70**	10	60	25	5	*
West	272	81	82	71	**71**	13	59	25	3	*
Description of Diet										
Healthy enough	327	80	82	76	**78**	18	59	17	5	*
Could be healthier	670	79	82	70	**70**	10	60	26	3	*

*Less than 0.5 percent.

Consumers continue to view spoilage as the predominant threat when asked to volunteer food safety concerns (Table 44). In fact, nearly half (46 percent) the shoppers view spoilage as a threat now—up sharply from 36 percent in 1992 and only 19 percent in 1991.

Other food safety concerns lag far behind. About one out of five shoppers continues to cite freshness, long shelf life or expiration dates (20 percent—up eight points from 1992) or spoilage due to germs (18 percent). Of concern to at least one in 10 are pesticides, residues, insecticides and herbicides (13 percent); improper packaging and canning (13 percent); preparation and processing of foods (12 percent); and unsanitary handling by supermarket employees (10 percent). Pesticides, residues, insecticides and herbi-

TABLE
▲44▲

PERCEIVED THREATS TO FOOD SAFETY, BY GENDER AND EDUCATION (VOLUNTEERED)

Q: *What, if anything, do you feel are the greatest threats to the safety of the food you eat? (Verbatim responses coded to categories listed below.)*

	Jan. 1990 Total	Jan. 1991 Total	Jan. 1992 Total	**Jan. 1993 Total**	Gender		High School Or Less	Some Coll./ Coll. Graduate
					Men	Women		
Base	1,005 %	1,004 %	1,000 %	**1,006 %**	281 %	725 %	446 %	555 %
Spoilage (NET)	29	27	36	**46**	44	47	44	48
Freshness/long shelf life/ expiration dates	x	6	12	**20**	17	21	21	20
Spoilage/germs	x	16	15	**18**	18	18	18	17
Quality control/improper shipping, handling, etc.	x	5	9	**9**	9	9	6	11
Bacteria/contamination	x	3	9	**8**	9	8	7	9
Pesticides/residues/ insecticides/herbicides	19	20	18	**13**	11	14	11	14
Improper packaging/ canning	16	17	10	**13**	10	14	10	15
Processing/preparation of foods	3	3	10	**12**	13	11	7	15
Unsanitary handling by supermarket employees	11	10	8	**10**	8	11	9	11
Chemicals	16	15	13	**8**	10	7	6	9
Tampering	14	8	6	**7**	10	6	7	6
Preservatives	8	7	6	**6**	5	7	6	6
Unsanitary handling by supermarket shopper	4	3	6	**4**	3	4	4	4
Additives (nonspecific)	6	6	5	**4**	3	5	4	5
Pollution/environmental pollution	4	3	3	**2**	3	1	1	2
Bugs/pests/rats	3	2	2	**2**	3	1	2	2
Artificial coloring	3	1	1	**1**	0	1	*	1
Antibiotics	2	2	*	**1**	1	1	1	1
Cleanliness of supermarket	x	x	x	**1**	1	1	1	*
Radiation	1	1	1	*	1	*	*	1
Other	10	4	7	**6**	6	6	6	6
None	6	3	3	**3**	4	3	4	2
Not sure	12	19	15	**14**	13	14	19	10

x = Not mentioned.

Multiple responses accepted.

cides (down five points to 13 percent) and chemicals (down five points to 8 percent) are the only items that fewer 1993 than 1992 shoppers see as a threat.

Perceived threats to food safety differ by gender and level of education (Table 44). More so than others, women and shoppers with at least some college worry about pesticides and residues and improper packaging and handling. Men express greater concern about the threat of chemicals and tampering. Those with at least some college education express greater concern with the processing and preparation of foods.

The 1993 *Trends* once again asked shoppers to rate the extent to which various food items may pose health hazards (see Table 45). Methodologies used for the questions in Tables 44 and 45 differed in two important respects. First, Table 44 lists items as volunteered by respondents, while the items in Table 45 were each asked specifically. Second, Table 44 used a question concerning "threats" to food safety, while Table 45 asked for opinions about "health hazards" in the food supply. An item considered to be a serious hazard in and of itself, for example, might be seen as little or no threat because it is perceived to occur rarely or at very low levels in the actual food supply.

Consumer concern about specific food attributes present a mixed picture. Residues, such as pesticides or herbicides, continue to be viewed as the most serious health hazard. Almost four out of five shoppers believe residues constitute a serious hazard (79 percent). Antibiotics and hormones in poultry and livestock are the next most serious hazard (55 percent). Other items (nitrates, irradiated foods, additives and preservatives, and artificial coloring) are felt to be about as serious a threat as in 1992.

TABLE
▲45▲

CONSUMER CONCERN ABOUT SELECTED FOOD ATTRIBUTES, 1987–1993

Q: *I'm going to read a list of food items that may or may not constitute a health hazard. For each one, please tell me if you believe it is a serious health hazard, somewhat of a hazard, or not a hazard at all?*

Base: 1,006 shoppers

	Serious Hazard						1993			
	Jan. 1987[1]	Jan. 1988[2]	Jan. 1989	Jan. 1990	Jan. 1991	Jan. 1992	**Serious Hazard**	Something of a Hazard	Not a Hazard At All	Not Sure
	%	%	%	%	%	%	%	%	%	%
Residues, such as pesticides and herbicides	76	75	82	80	80	76	**79**	17	2	2
Antibiotics and hormones in poultry and livestock	61	61	61	56	56	53	**55**	34	5	6
Nitrites in food	38	44	44	37	41	40	**35**	40	7	18
Irradiated foods	43	36	42	42	42	35	**35**	28	10	28
Additives and Preservatives	36	29	30	26	29	26	**23**	63	10	4
Artificial coloring	24	21	28	21	24	21	**19**	51	26	4

May not add to 100 percent due to rounding.

[1]Split sample; bases = 498 and 509.

[2]Split sample; bases = 508 and 511.

Responsibility for Food Safety

Shoppers continue to assume responsibility themselves for food safety (Table 46). They remain nearly twice as likely to feel that they should take this responsibility rather than rely on any other source (38 percent). Consumers now rely about equally on manufacturers (21 percent) and government (20 percent)—a continuation of the dramatic change from 1988 when three times as many consumers relied on the government as on industry. One in 10 places responsibility with their food store. Reliance on consumer organizations remains unchanged since 1992 at 5 percent, declining from the high of 15 percent in 1987 and 1988.

TABLE
▲46▲

THOSE ON WHOM SHOPPERS RELY TO ENSURE THAT THE PRODUCTS THEY BUY ARE SAFE

Q: *As far as you personally are concerned, whom do you rely on most to be sure that the products you buy are safe: the federal government, the state government, consumer organizations, manufacturers, retailers, or yourself as an individual?*

Base: 1,006 shoppers

	Total										
	1983	1984	1985	1986	1987[1]	1988[2]	1989	1990	1991	1992	**1993**
	%	%	%	%	%	%	%	%	%	%	%
Yourself as an individual	46	48	38	48	45	45	41	35	39	40	**38**
Manufacturers	13	11	7	8	9	7	14	19	19	20	**21**
Government	27	25	37	33	28	29	23	27	23	21	**20**
Food stores[3]	5	5	6	2	5	3	10	9	8	9	**10**
Consumer organizations	6	9	8	9	15	15	8	7	7	5	**5**
All/everybody	x	x	x	x	x	x	x	x	2	4	**3**
Farmers	x	x	x	x	x	x	x	x	x	1	**2**
Other (vol.)	*	1	1	*	1	1	1	2	*	0	**0**
None (vol.)	1	*	1	*	*	*	*	1	*	*	*
Not sure	2	1	2	*	2	2	2	1	2	1	**2**

x = Not asked.

May not add to 100 percent due to roundng.

*Less than 0.5 percent.

[1]Split sample; base = 498.

[2]Split sample; base = 511.

[3]Reported as "Retailers" in earlier years.

CHAPTER 8

A RETROSPECTIVE OF *TRENDS*

Trends long-term effort of monitoring attitudes and changing shopping and lifestyle patterns of supermarket shoppers was launched in 1973. Four major areas were covered in three surveys conducted during 1973-1974:

▲ Consumerism—and the Credibility of the Industry.

▲ Inflation and the Money Squeeze.

▲ Food Shortages.

▲ Changing Lifestyles and Shopping Patterns Affecting the Industry and Its Methods of Operation.

This year, *Trends* selected several questions from the first survey to help provide a retrospective of consumer attitudes toward supermarkets.

How Supermarkets Are Perceived on Meeting Their Responsibilities

Supermarkets have long recognized that to better serve customers they must do more than meet the threshold requirements of clean stores, safe food products and variety. This year's *Trends* examines how supermarkets have progressed in meeting their responsibilities to their customers. In 1993, *Trends* asked shoppers to evaluate supermarkets on a list of seven consumer protection measures that were first asked in 1973.

A majority of shoppers in 1993 feel their supermarkets are looking after their customers. Over one-half say the supermarkets are doing the right amount on six of the seven consumer protection items (Table 47). The only service area in which supermarkets are

TABLE ▲47▲

CONSUMER EVALUATIONS OF SUPERMARKET RESPONSIBILITIES IN PROTECTING CONSUMERS, 1973 VERSUS 1993

Q: *Would you say that the supermarkets are doing too much, too little, or just about the right amount when it comes to . . .?*

Base: 1,000 shoppers in 1993; 2,000 shoppers in 1973

	1993				1973
	Doing Right Amount	Doing Too Little	Doing Too Much	Don't Know	Doing Right Amount
	%	%	%	%	%
Making sure that the store ads are honest and not exaggerated	**80**	13	3	5	**44**
Making sure that the products sold are fresh	**78**	18	2	2	**46**
Making sure that food products sold in the stores are safe	**72**	19	2	6	**51**
Helping customers know what things cost through price-per-unit information	**67**	28	2	4	**49**
Seeing that customers can tell the quality and grade of the food by reading the labels	**65**	30	2	4	**50**
Helping people to stretch their dollar	**57**	38	2	4	**44**
Teaching people more about nutrition	**40**	53	2	4	**29**

perceived to have substantial room for improvement is teaching people more about nutrition (53 percent say supermarkets are doing too little).

In 1993, supermarkets are rated highest on:

▲ Making sure that store ads are honest and not exaggerated (80 percent say doing the right amount, compared with 44 percent in 1973).

▲ Making sure that the products sold are fresh (78 percent say doing the right amount, compared with 46 percent in 1973).

Two-thirds, or more, also say that supermarkets are doing the right amount regarding:

▲ Making sure that food products sold in the stores are safe (72 percent compared with 51 percent in 1973).

▲ Helping customers know what items cost through price-per-unit information (67 percent, compared with 49 percent in 1973).

▲ Seeing that customers can tell the quality and grade of the food by reading the labels (65 percent, compared with 50 percent in 1973).

About six in 10 shoppers feel their supermarkets are helping people stretch their food dollar, compared with 44 percent in 1973.

Supermarkets have apparently made great strides in meeting their responsibilities to their customers. Shopper attitudes have changed dramatically since 1973, when there was apparently a widespread feeling among consumers that supermarkets could do more to help their customers. Today, by contrast, shoppers appear to have a high regard for the efforts supermarkets have made to protect and educate them.

In 1973, for example, fewer than one-half of shoppers said that supermarkets were doing the right amount on five of the seven items. The highest ratings were given only to safe food products (51 percent) and food label clarity (50 percent).

Over time, the biggest positive gains in customer perceptions are with respect to making sure that store ads are honest and not exaggerated and helping people stretch their dollar—each up 36 points.

Despite the apparent positive gains supermarkets show with respect to meeting their responsibilities to customers, teaching people more about nutrition continues to be one area where fewer than one-half of shoppers say that supermarkets are doing the right amount (29 percent in 1973 and 40 percent in 1993).

Those who feel supermarket nutritional education efforts are less than adequate tend to be the youngest and older shoppers, households with incomes of $25,000 or more, and households with children (Table 48).

TABLE
▲48▲

TEACHING PEOPLE MORE ABOUT NUTRITION, BY AGE, TYPE OF HOUSEHOLD AND INCOME, 1993

Q: *Would you say that the supermarkets are doing too much, too little, or just about the right amount when it comes to. . . ?*

	Base	Teaching People More About Nutrition
		%
Doing Too Little		
Total	1,000	53
Age		
18–24	66	65
25–39	356	58
40–49	205	51
50–64	216	46
65 or older	149	62
Type of Household		
With children	438	58
No children	555	51
Income		
Less than $15,000	170	49
$15,001–$25,000	180	49
$25,001–$35,000	172	62
$35,001–$50,000	186	53
Over $50,000	152	55

The Experience Of Supermarket Shopping

Presumably, grocery shopping is more than a simple exercise. Shoppers feel both positive and negative emotions, all which combine to enhance or detract from the supermarket experience.

The 1973 *Trends* study examined this phenomenon by asking shoppers to respond to seven questions about the supermarket experience. *Trends* 1993 repeated the series of questions. The results are summarized in Table 49.

Three in four 1993 shoppers feel the people working in the store are always pleasant and friendly. This is consistent with the earlier findings on consumer expectations and ratings of their supermarkets in Chapter 1. The customer focus on employees cannot be ignored, since shoppers recognize it as a key part of their shopping experience.

The majority of today's shoppers also say that they feel they've done a good job of managing their money and budgeting well after a visit to the supermarket (58 percent, compared with 27 percent in 1973).

With respect to the five other aspects of the grocery shopping experience, the majority of consumers said they only occasionally have these experiences (Table 49). For example, only one in eight shoppers said they always get some new ideas on what to serve or some hints on how to feed the family better. Few shoppers say they routinely find unexpected bargains when they go shopping or are anxious to try a newly purchased product. These are the "small things" that often stick in a shopper's mind and enhance the supermarket shopping experience.

Shoppers' feelings of having shopped well, done a good job of managing the food budget, and come away with unexpected benefits/purchases should be reinforced by supermarkets in order to enhance the grocery shopping experience.

In 1973, shoppers were asked what kind of mood they were in when entering the supermarket, and also how they felt upon leaving. Nearly nine out of 10 shoppers reported being in a *good* mood when first starting out, but only three-quarters of them remained so when they had finished their shopping.

Compared to 1973, today's shoppers, however, have far more positive sentiments about grocery shopping. Among the seven feelings examined, all have significantly increased:

▲ Having done a good job at managing money and budgeting well (up 31 points).

▲ Feeling good about an unexpected bargain (up 23 points).

▲ Pleasant and friendly employees (up 22 points).

▲ Anxious to try a newly purchased product (up 16 points).

▲ Pleasure from an impulse purchase (up eight points).

▲ Getting new ideas on what to serve (up four points).

▲ Getting hints on how to feed your family better (up four points).

TABLE
▲49▲

SOURCES OF GRATIFICATION IN SUPERMARKET SHOPPING, 1973 VERSUS 1993

Q: *Would you tell me for each of the following statements whether it is almost always, occasionally, or never true of how you feel when you walk out of the supermarket:*

Base: 1,000 shoppers in 1993; 2,000 shoppers in 1973

	1993				1973
	Almost Always True	Occasionally True	Never True	Don't Know	Almost Always True
	%	%	%	%	%
People working in the store were pleasant and friendly	76	22	1	*	54
You feel you've done a good job of managing your money and budgeting well	58	33	8	1	27
You feel good because you've found an unexpected bargain	38	52	9	1	15
You're anxious to try a new product you've just bought	32	54	13	1	16
You've gotten pleasure out of some impulse purchase	21	58	19	2	13
You've gotten some new ideas on what to serve	12	66	21	1	8
You've gotten some hints on how to feed your family better	12	51	36	2	8

Nutritional information showed the smallest gain. Getting ideas on what to serve and hints on how to feed the family better each showed a gain of only four points.

What distinguishes high gratification from low gratification? The following groups of people are more likely to find pleasure in the supermarket experience:

▲ Nonworking women (51 percent).

▲ Those with high school education or less (52 percent).

▲ Households with incomes under $25,000 (49 percent).

▲ Eastern households (50 percent).

▲ Shoppers with physical disabilities (51 percent).

▲ Heavy economizers (52 percent).

▲ Shoppers who rate their primary supermarket as very good or excellent (rating of 8-10) (49 percent).

The key to customer loyalty hinges on the quality of the shopping experience coupled with providing the core services of cleanliness, low prices, quality products and variety. The intangibles—e.g., the experience of friendly employees and the personal feelings of task accomplishment—are important components in building the supermarket's image.

TABLE
▲50▲
LEVEL OF GRATIFICATION, BY DEMOGRAPHICS AND LEVEL OF SATISFACTION, 1993

	Base	Mean	Low Gratification[1]	High Gratification[2]
	%	%	%	%
Total	912	2.7	54	46
Gender				
Men	229	2.6	49	41
Women	683	2.8	53	47
Working	364	2.7	56	44
Nonworking	316	2.9	49	51
Education				
HS graduate or less	447	2.9	48	52
Some college/college graduate	458	2.5	61	39
Income				
$15,000 or less	156	2.9	46	54
$15,001–$25,000	169	2.8	52	48
$25,001–$35,000	157	2.6	54	46
$35,001–$50,000	159	2.7	57	43
$50,000 or more	142	2.4	66	33
Age				
18–24	59	3.0	53	47
25–39	312	2.5	60	40
40–49	185	2.6	58	42
50–64	205	3.0	49	51
65 +	145	3.0	46	54
Region				
East	161	3.0	50	50
Midwest	285	2.7	53	47
South	261	2.7	57	43
West	205	2.7	55	45
Physical Disability				
Yes	106	2.8	49	51
No	799	2.7	55	45
Heavy Economizer				
Yes	395	2.9	48	52
No	517	2.6	59	41
Supermarket Rating				
Low (1–7)	222	2.4	65	38
High (8–10)	690	2.9	51	49

[1]Those saying "Almost Always True" on 1–2 of the seven items.

[2]Those saying "Almost Always True" on 3 or more of the seven items.

Meeting Shoppers' Expectations

In 1973, inflation or high prices was the number one problem worrying most Americans (74 percent). Today, job concerns—unemployment and the lack of good paying jobs—are the most pressing problems.

In 1973, shoppers were asked to describe their favorite supermarket—often an indication of customer expectations or factors that are important in food shopping. The top mentioned items in 1973 were:

- ▲ Keep store clean (75 percent).
- ▲ Open convenient hours (70 percent).
- ▲ Good parking (68 percent).
- ▲ Convenient location (68 percent).
- ▲ Personnel friendly and helpful (67 percent).
- ▲ Well organized/easy to find things (64 percent).
- ▲ Keep well stocked (63 percent).
- ▲ Carry quality items (63 percent).
- ▲ Carry fresh perishables (62 percent).
- ▲ Cash checks (61 percent).

Almost all of the items on the 1973 list are still important today. For instance, *Clean, neat store* ranks top in importance among today's consumers, followed closely by *Quality items* (fruits, vegetables, meats); *Good variety or wide selection; Courteous, friendly employees;* and *Convenient location.* With the advent of *24-hour operations,* convenient hours is mostly a non-issue.

Today's consumer, however, places high importance on product freshness *(Use-by/best-if-used-by date marked on products)* and *Readable and accurate shelf tags.* With the advent of faster distribution and computerized inventory, customer expectations in several areas have risen to new heights. A case in point—the desire for wider variety or greater selection is a strong reason for store switching (21 percent of switchers).

Today's consumers go to the supermarket more often than did shoppers in 1973. In 1973, the majority made one visit per week to the supermarket; today's customers are more likely to make two to three trips per week (65 percent). This may be a reflection of more carry-out and convenience products.

Number of Visits Per Week	1973	1993
1 or less	51	34
2	29	33
3+	20	32

With changing lifestyles, shoppers today seek out stores that provide additional services and one-stop shopping. Few stores offered such services in 1973.

Over the past 20 years, supermarkets have brought great value to their customers. Most of the issues of 20 years ago have been addressed and addressed well. The industry is proud of this progress and looks forward to opportunities to improve the shopping experience even more.

TRENDS 93

METHODOLOGY

SELECTION OF THE SAMPLE

The data for this survey were collected from 2,006 telephone interviews conducted from January 7 to February 16, 1993. Households contacted for the survey were selected by a procedure known as random digit dialing (RDD). This procedure ensures the inclusion of households with unlisted or not yet listed telephone numbers, as well as those with listed numbers, and thus closely approximates the total U.S. population.

Within each household the respondent was selected by the following three criteria:

▲ Male or female head of household.

▲ Having primary or equally shared responsibility for food shopping.

▲ Having shopped for groceries in the past two weeks.

Respondents were randomly assigned to one of two versions of the questionnaire: 1,000 shoppers completed Version A (Shopping Habits) and 1,006 completed Version B (Nutrition/Food Safety). Data are presented in aggregate where questions are common to both versions. Shopper characteristics differ little by version and are profiled in Table 51.

So that the 1993 *Trends* surveys in the United States, Canada, Europe and Australia may be compared, the U.S. sample was *not* controlled for sex of respondent. Rather, male and female head of households who met the other screening criteria were interviewed as they occurred within the population (i.e., they were self-selected). This was initiated in 1991 so that these *Trends* data and that for subsequent surveys in this series could be compared with similar international data. This procedure resulted in a 73 percent/27 percent ratio of females to males (compared with an 80 percent/20 percent ratio in prior years). The resultant sample is a nationwide cross section of shoppers. Therefore, all subpopulation percentages are projectable to the U.S. shopping public as a whole.

Through 1990, the *Trends* sample was controlled to consist of 60 percent female heads of households and 40 percent male heads of households. The sample was then weighted to an 80 percent female/20 percent male ratio to approximate the actual proportions of female and male food shoppers and to maintain comparability with previous studies in the *Trends* series. Given the relatively similar distributions of primary food shoppers by sex in the 1991 and prior surveys, the effect of this one-time change in the sampling methodology is minimal.

TABLE
▲51▲

DEMOGRAPHIC PROFILE OF SUPERMARKET SHOPPERS, 1993

	Number In Total Sample	Percentage In Version A Sample	Percentage In Version B Sample	**Percentage In Total Sample**
		%	%	%
Total	2,006	100	100	**100**
Gender				
Men	540	26	28	**27**
Women	1,466	74	72	**73**
Working	808	40	41	**40**
Nonworking	652	34	31	**33**
Primary Food Shopper				
Male head of household	276	13	14	**14**
Female head of household	1,147	58	56	**57**
Equally shared	583	29	30	**29**
Type of Household				
With children	869	44	43	**43**
No children	1,125	56	57	**56**
Age				
18–24	147	7	8	**7**
25–39	702	36	34	**35**
40–49	421	21	22	**21**
50–64	423	22	21	**21**
65 and over	302	15	15	**15**
Income				
$15,000 or less	354	17	18	**18**
$15,001–$25,000	334	18	15	**17**
$25,001–$35,000	339	17	17	**17**
$35,001–$50,000	370	19	18	**18**
$50,001 or more	353	15	20	**18**
Marital Status				
Single/separated/divorced/widowed	680	34	33	**34**
Married	1,312	65	66	**65**
Education				
High school or less	921	48	44	**46**
Some college/college graduate	1,072	52	55	**53**
Medically Restricted Diet				
Yes	371	18	19	**19**
No	1,623	81	81	**81**
Physical Disability				
Yes	213	12	10	**11**
No	1,779	88	90	**89**
Region				
East	356	18	18	**18**
Midwest	566	31	26	**28**
South	592	29	30	**30**
West	492	22	27	**25**

**East includes* Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont and West Virginia.

Midwest includes Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin.

South includes Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas and Virginia.

West includes Arizona, California, Colorado, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington and Wyoming.

Note: Percentages may add up to less than 100 percent as a result of nonresponse.

Sampling Error

All survey results are subject to sampling error, i.e., the difference between obtained results and those that would be obtained by studying the entire population. The size of this error varies with the size of the sample and with the percentage of respondents giving a particular answer. Table 52 shows the range of error for samples of different sizes and at different percentages of response.

This table can be used to determine the approximate sampling errors associated with results presented in this report. An example illustrates this process.

As shown in Table 8 of this report, 37 percent of those surveyed this year spend $61 to $100 each week on groceries for their families. This percentage is based on the total sample of 2,006 shoppers. From Table 52, the sampling error associated with a 40 percent response for a sample of 2,000 is plus or minus 2.2 percentage points. If one applies this sampling error to the 37 percent response in Table 8, the true proportion of shoppers who spend $61 to $100 a week should be no less than 35 percent and no more than 39 percent.

Aside from knowing the sampling error of any given finding, one may also be interested in whether the differences among certain percentage figures are a likely result of sample variation or due to real differences in the shopping population. For example, Table 22 shows an eight-point difference between the percentage of shoppers from households with children who average one supermarket trip a week and those from households with no children (26 percent vs. 34 percent, respectively) who do this. Although this eight-point difference seems large, it could be due to sampling error. To determine whether this is a true difference, one needs to consider the number of people responding to each question, as well as the particular percentages reported. In general, the larger the sample size, the less likely a reported difference will be due to sampling error.

TABLE
▲52▲

SAMPLING ERROR (+/−) AT 95 PERCENT CONFIDENCE LEVEL FOR SAMPLES OF EIGHT DIFFERENT SIZES

Percentage of Response	Size of Sample								
	2,000	1,000	700	600	500	400	300	200	100
	%	%	%	%	%	%	%	%	%
10(90)	1.3	1.9	2.2	2.4	2.6	2.9	3.4	4.2	5.9
20(80)	1.8	2.5	3.0	3.2	3.5	3.9	4.5	5.5	7.8
30(70)	2.0	2.8	3.4	3.7	4.0	4.5	5.2	6.4	9.0
40(60)	2.2	3.0	3.6	3.9	4.3	4.8	5.5	6.8	9.6
50(50)	2.2	3.1	3.7	4.0	4.4	4.9	5.7	6.9	9.8

In Table 53, the minimum percentage difference that must occur to be considered real is shown for varying sample sizes and varying percentage responses.

As shown in Table 22 of this report, 869 respondents who live in households with children under 18 years were asked how many times they go to the supermarket in an average week, of whom 26 percent said once. A total of 1,125 households without children were asked the same question, and 34 percent average one trip. These sample sizes are closest to the 1,000 and 1,000 sample size row of the table. The two percentages are closest to the 30 percent or 70 percent column. From the table, the minimum difference between percentages that would not be due to sampling error is four points. Because the difference between 26 percent and 34 percent exceeds this minimum, one can safely assume that fewer shoppers in households with children than those without children shop only once per week.

TABLE
▲53▲

SAMPLING ERROR OF DIFFERENCE BETWEEN PROPORTIONS

Sampling Tolerances (at 95% Confidence Level) to Use in Evaluating Differences Between Two Percentage Results

Approximate Sample Size of Two Groups Asked Question on Which Survey Results Are Based	Survey Percentage Results at 10% or 90%	Survey Percentage Results at 20% or 80%	Survey Percentage Results at 30% or 70%	Survey Percentage Results at 40% or 60%	Survey Percentage Results at 50%
2,000 vs. 2,000	2	2	3	3	3
2,000 vs. 1,000	2	3	3	3	4
1,000 vs. 1,000	3	4	4	4	4
500	3	4	5	5	5
300	4	5	6	6	6
200	5	6	7	7	8
100	6	8	9	10	10
700 vs. 500	3	5	5	6	6
300	4	5	6	6	7
200	5	6	7	7	8
100	6	8	10	10	10
500 vs. 500	4	4	6	6	6
300	4	6	7	7	7
200	6	7	8	8	8
100	7	9	10	11	11
300 vs. 300	5	6	7	8	8
200	5	7	8	9	9
100	7	9	10	11	11
200 vs. 200	6	8	9	10	10
100	7	10	11	12	12
100 vs. 100	8	11	13	14	14

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